



AI GUIDE SERIES · BOOK THREE

AI at Work

Patrick Thomas

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Increase Productivity Without Working Longer Hours

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*Increase Productivity Without Working Longer
Hours*

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AI GUIDE SERIES

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*For everyone who ever stayed late finishing work that a machine could have done in seconds.
This one's for you.*

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Introduction

The Day Everything Changed

It was a Tuesday afternoon, and Sarah had a problem.

She had three reports due by Friday, a staff meeting to plan, forty-seven unread emails, and a presentation that needed to be completely rewritten. Her manager had just asked her to also pull together a competitor analysis by end of week.

Two years earlier, Sarah would have stayed late every night that week. She would have skipped lunch, stressed out, and maybe still missed a deadline.

But on this particular Tuesday, Sarah opened her laptop, pulled up an AI tool, and got to work. By Wednesday afternoon, she had solid drafts of every report, a meeting plan, a cleaned-up inbox, and a clear path to finish the rest of the week without staying late. She left at 5 p.m.

That's what this book is about.

The 5D Work System

Here's what Sarah actually did, broken into the five moves that made it possible:

She **Drafted** the three reports by giving AI her rough notes and the structure she needed. She **Digested** a stack of competitor websites into a two-page summary using Perplexity. She **Decided** on the meeting agenda by asking AI to prioritize topics by urgency. She **Designed** a presentation outline in ten minutes instead of two hours. And she **Delegated** her standard weekly email update to a saved prompt that fills itself in.

Five moves. Five categories. One system. That's the 5D Work System — and by the end of this book, it'll be yours.

Why AI Is Changing the Workplace

Let's be honest: most of us spend a huge chunk of our workday doing things that are necessary but exhausting. Drafting emails. Summarizing long documents. Formatting reports. Pulling together meeting notes. Searching for information we know is buried somewhere.

These tasks are not the reason you were hired. You were hired for your judgment, your relationships, your expertise, and your ideas. But the repetitive work keeps piling up and eating your time.

AI changes that equation.

Modern AI tools can write a first draft in seconds. They can summarize a ten-page report in a paragraph. They can answer questions, brainstorm ideas, clean up data, and create presentations — all while you focus on the parts of your job that actually require a human.

What You'll Learn

By the time you finish this book, you'll be able to:

- Write emails, reports, and documents in a fraction of the time
- Run better meetings with AI-generated agendas and summaries
- Research topics, analyze data, and create presentations faster than you thought possible
- Use the right AI tool for each type of task
- Protect yourself and your company by using AI safely
- Build a personal AI system that works for your specific job

This book is organized into five parts, each building on the last. You can read it straight through, or jump to the chapters most relevant to your job right now.

10 HOW TO USE THIS BOOK

The best way to use this book is with an AI tool open in front of you. When you see a prompt example, try it. When you read about a

Chapter One

What AI Can (and Can't) Do

Your new coworker is very fast, very smart, and a little strange.

Before you can use AI effectively, you need to understand what it actually does — and what it doesn't do.

Think of AI as the most capable intern you've ever had. This intern can work at superhuman speed, never gets tired, and has read more books, articles, and websites than any human ever could. Ask it to write something and it'll give you a first draft in seconds. Ask it to summarize a document and it'll nail the key points. Ask it to brainstorm, organize, or explain — it's ready.

But here's the thing about this intern: they've never actually worked at a real job. They've absorbed an enormous amount of information, but they don't know your company, your clients, your industry quirks, or your specific situation — unless you tell them.

That's the key insight of this whole book. **AI is powerful, but it needs direction. You are the expert. AI is your tool.**

The 9 Things AI Does Well

1. Writing. AI can write emails, reports, memos, proposals, social media posts, job descriptions, performance reviews, and virtually any other type of professional document. It won't always nail the tone perfectly on the first try — but it gives you a strong draft you can edit, which is almost always faster than starting from scratch.

2. Summarizing. Have a 30-page report you need to understand in the next ten minutes? Drop it into an AI tool and ask for a summary. You can ask for the key points, a one-paragraph overview, or a summary written for a specific audience. This alone can save hours every week.

3. Brainstorming. Stuck on an idea? AI makes an incredible thinking partner. Ask it to generate twenty ideas for a marketing campaign, suggest solutions to a workflow problem, or come up with topics for your next team meeting.

4. Organizing Information. AI can take a messy pile of notes and turn them into a structured outline. It can convert your rambling voice memo into a clean action list.

6. Creating Images. AI image tools like DALL-E, Midjourney, and Adobe Firefly can generate professional-looking visuals from a text description. This used to require a graphic designer. Now it takes about thirty seconds.

7. Creating Presentations. AI can turn your notes or an outline into a full slide deck. It can write speaker notes, suggest slide structures, and help you tell a visual story.

8. Coding. Even if you've never written a line of code in your life, AI can help you automate repetitive computer tasks, build simple tools, and write scripts that save hours of manual work.

9. Research Assistance. AI can give you a solid overview of almost any topic in minutes. Tools like Perplexity can even search the web in real time to give you current information.



Where AI Still Fails You

AI can make things up. It's called "hallucination" and it happens more than you'd like. Always verify important facts.

AI doesn't know your company. Unless you tell it, it doesn't know your processes, your culture, your clients, or your history.

AI can't read the room. It doesn't know your office politics. Your judgment still matters — a lot.

AI can be confidently wrong. It sounds authoritative even when it's incorrect. Never assume it's right just because it sounds sure of itself.

AI is not a therapist, legal advisor, or doctor. It can share information, but don't use it as a substitute for professional advice.

KEY TAKEAWAY

14 AI is a starting point, not a finish line. Always review what it gives you before you send it, publish it, or act on it. The most successful AI users think of it as a collaboration — you bring the context and

Chapter Two

Picking Your Tool

Not all AI tools are created equal — here's how to choose.

Walk into a hardware store and you'll find dozens of different types of screwdrivers. They all turn screws, but you'd never use a tiny eyeglass screwdriver to build a deck. The right tool for the right job makes everything easier.

AI tools are the same way. They're all impressive, but they have different strengths. Here's a plain-English breakdown of the major players.

A NOTE ON FAST-MOVING TARGETS

AI tools change quickly. The names, features, and pricing described here are accurate as of publication, but details may have shifted since then. The decision rule matters more than the exact tool list: choose the tool that fits your workflow, your privacy needs, and your company's policy.

ChatGPT — The Swiss Army Knife

Made by OpenAI, ChatGPT is the tool most people have heard of, and for good reason — it does a little of everything, and it does it well. The free version is solid. The paid version is significantly more capable and worth the cost if you plan to use AI regularly for work.

Best for: Writing, brainstorming, answering questions, creating content, summarizing documents, and general everyday tasks.

Claude — The Writer and Thinker

Made by Anthropic, Claude is known for two things: nuanced writing and handling very long documents. If you need to drop in a lengthy report and ask questions about it, Claude handles that better than almost any other tool.

Best for: Long documents, nuanced writing, complex analysis, and polished output.

Gemini — The Google Native

Google's AI tool integrates directly into Google Workspace — meaning it

Microsoft Copilot — The Office 365 Partner

Microsoft Copilot is built into Word, Excel, Outlook, PowerPoint, and Teams. It can literally summarize a Teams meeting as it's happening.

Best for: Anyone in the Microsoft 365 ecosystem, especially for document-heavy work.

Perplexity — The Research Tool

Perplexity is designed specifically for research. It searches the web in real time and gives you cited, up-to-date answers. It's like a search engine that actually reads the results and synthesizes the answer for you.

Best for: Research, fact-checking, finding current information, and competitive analysis.

NotebookLM — The Document Analyst

Google's NotebookLM is built for one purpose: deep analysis of documents you upload. You drop in your files and then have a conversation about them.

Best for: Anyone who regularly works with large volumes of documents and needs to extract insights fast.

KEY TAKEAWAY

Start with one tool and get comfortable before exploring others. ChatGPT or Claude are the best starting points for most workers.

QUICK TIP

Match the tool to where you already work. In Google Workspace?

18 Try Gemini. In Microsoft 365? Try Copilot. Need research? Use Perplexity. Working with long documents? Try Claude. Everything else? ChatGPT is a great default.

Chapter Three

AI Safety You Can't Skip

A few rules that protect you, your company, and your clients.

Here's a scenario that actually happens: an employee pastes a confidential client contract into an AI tool to help summarize it. The AI gives a great summary. But that confidential information has now been sent to a third-party server — potentially violating the client agreement, company policy, and data privacy laws.

This isn't meant to scare you. It's meant to make you a smart user. AI is powerful and helpful, but it comes with real responsibilities.

Rule 1: Know Your Company's Policy

Before you start using AI tools for work, find out what your company allows. Many organizations have policies about which tools employees can use and what information can be shared with them. If your company doesn't have a policy yet, ask.

Rule 2: Never Share Confidential Information

Do not paste the following into a public AI tool:

Client names, contracts, or sensitive business information

Employee personal information — Social Security numbers, salaries, health data

Proprietary company data, trade secrets, or unpublished financial results

Passwords, login credentials, or security information

Any information governed by privacy laws like HIPAA or GDPR

If you work in healthcare, finance, law, or any regulated industry, this matters even more. When in doubt, leave it out.

Rule 3: Watch Out for Hallucinations

AI tools are trained to sound confident and helpful — even when they're wrong. Common hallucination traps include statistics, specific dates, quotes from real people, citations of research studies, and details about specific laws or regulations. If something sounds surprising or very specific, verify it before you use it.

Rule 4: Understand Copyright Basics

AI-generated content exists in a legal gray area that is still evolving. For routine workplace drafts — internal memos, emails, reports — AI-generated text is generally treated like any other draft you review and edit.

Be especially careful about: using AI image generators to recreate specific artists' styles without permission, asking AI to reproduce large sections of published books or articles, and presenting AI-generated creative work as entirely your own in public-facing or commercial contexts. When in doubt, treat AI output the way you'd treat a draft from a contractor: review it, edit it, and make it meaningfully yours.



The 5-Point AI Safety Checklist

Before using any AI output:

Did I avoid sharing confidential or personal information?

Have I verified any specific facts, numbers, or statistics?

Does this comply with my company's AI policy?

Does this content feel authentic and represent my actual views?

Have I reviewed and edited the output before using it?

When NOT to Use AI

When making a critical decision that requires verified, current data

When the task requires genuine human empathy — like a condolence message

When you'd be violating a company policy or legal requirement

When speed matters less than absolute accuracy with zero room for error

22 TRY THIS TODAY

Find out your company's AI policy — or the absence of one. Ask your manager or IT department: "Are there AI tools we're approved

Chapter Four

The Prompting Formula

The difference between a mediocre AI response and an amazing one is almost always how you asked.

Imagine you walk up to a new employee and say, "Write something about the budget."

What do you get back? Who knows. Maybe a budget summary. Maybe a budget proposal. Maybe a poem about money. You gave them nothing to work with.

Now imagine you say: "You're our finance manager. Write a one-page summary of our Q3 budget performance for our board meeting. Focus on the three biggest variances from the plan. Keep it professional but not overly technical. Use bullet points for the key findings."

That's a different story entirely. This is the art of prompting — and it's the single most important skill in this entire book.

The Formula: Role + Task + Context + Requirements + Format + Example

Every great prompt has up to six ingredients. You don't need all six every time, but the more you include, the better your results.

Role — Tell AI who to be. Start your prompt by assigning a role. This sets the tone, expertise level, and perspective for the entire response. *Example: "You are an experienced HR manager at a mid-sized tech company..."*

Task — Say exactly what you want. Be specific. Don't say "write an email." Say "write a follow-up email to a client who hasn't responded in two weeks." *Example: "Write a three-paragraph executive summary of the following report..."*

Context — Give the background. The more relevant background you provide, the more accurate the output. Who is the audience? What's the situation? What has already happened?

Requirements — Set the rules. Tell AI what to include or avoid. Do you want a formal tone or casual? Should it avoid jargon? Are there specific points that must be covered?

Format — Specify the output structure. Should the response be a

Putting It All Together

PROMPT

You are an experienced project manager. [ROLE] Write a project status update email to our executive team. [TASK] We are three weeks into a six-week website redesign. We're on schedule, but we just discovered a technical issue that might add two days to the timeline. [CONTEXT] Keep the tone professional but not alarming. Be honest without being overly detailed. [REQUIREMENTS] Format it as a short email with a subject line, a two-sentence summary, and three bullet points covering status, the issue, and next steps. [FORMAT]

The 3 Most Common Prompting Mistakes

Mistake 1: Being Too Vague. "Help me with my presentation" tells AI almost nothing. "Create a 10-slide outline for a 20-minute sales presentation introducing our new software product to small business owners who have never used project management software" — now we're talking.

Mistake 2: Not Iterating. The first response you get is almost never the final product. Treat AI like a conversation. If the tone is wrong, say so: "Make this less formal." If it's too long: "Cut this in half." Iterate until it's right.

Mistake 3: Copying Without Reviewing. Never send AI output without reading it first. Not because AI is usually wrong, but because this is your name on it. Own it.

KEY TAKEAWAY

Prompting is the engine behind every D in the 5D Work System. A well-written prompt is what makes the difference between a useful result and a frustrating one.

Chapter Five

Email in Half the Time

The task that eats your day — finally tamed.

REAL WORKDAY: BEFORE & AFTER

Before: Marcus, an operations manager, spent about 45 minutes every morning working through his email backlog. Writing replies, thinking through tone, crafting difficult messages — it was slow, draining work that left him behind before the real day even started.

After: Marcus now spends 15 minutes on email each morning. He pastes difficult emails into Claude, describes what he wants to say, and edits the draft. He's not sending worse emails — he's sending better ones, faster, with less mental energy spent on words and more on actual decisions.

The average office worker spends nearly 2.5 hours every day on email. That's more than 600 hours a year — fifteen full work weeks — just reading and writing messages. AI can cut that time significantly.

SAFETY REMINDER

Before pasting any email into an AI tool, ask yourself: does this contain confidential client information, sensitive employee data, or anything governed by your company's privacy policy? If yes, remove that information first.

Writing Emails from Scratch

PROMPT

Write a professional email to a new vendor introducing our company and asking for a product catalog and pricing. We're a 50-person manufacturing company looking to source industrial cleaning supplies. Keep it concise and professional.

Replying Professionally

PROMPT

Here is an email I received from a client who is unhappy with a

Shortening Emails

PROMPT

Shorten this email to under 100 words without losing the key message: [PASTE YOUR EMAIL]

Handling Difficult Conversations

PROMPT

Write an email declining a meeting request from a colleague who wants 90 minutes of my time for a project I'm not involved in. Be polite but firm. Offer a 15-minute call as an alternative if it's truly urgent.

Follow-Up Emails

PROMPT

Write a follow-up email to a client I met with two weeks ago. I sent them a proposal but haven't heard back. Be friendly and low-pressure. Ask if they have questions and let them know I'm happy to jump on a call.



10 Ready-to-Use Email Templates

"Write an email requesting [deadline extension / meeting / approval] from [my manager / client / vendor]. The situation is: [CONTEXT]."

"Write a thank-you email after [job interview / meeting / presentation]. Mention specifically: [DETAIL]."

30 "Write an out-of-office reply for [dates]. I'll be back on [date]. Urgent matters should go to [NAME]."

"Write an introduction email connecting [PERSON A] and

Chapter Six

Meetings That Actually Move Work Forward

Stop spending half your week in meetings that could have been an email.

REAL WORKDAY: BEFORE & AFTER

Before: Jennifer managed a team of eight and ran three recurring meetings a week. After each one, writing up the notes and action items took 30–45 minutes — time she didn't have. Things fell through the cracks. Follow-through was inconsistent.

After: Jennifer takes rough bullet points during each meeting, pastes them into ChatGPT immediately after, and has a clean summary with owners and due dates in two minutes. She sends it before she's even left the conference room. Her team now says the follow-through has never been better — and Jennifer saved nearly two hours a week.

Before: Creating an Agenda

A well-structured agenda is the single biggest predictor of a productive meeting. With AI, it takes about ninety seconds.

PROMPT

Create a 45-minute team meeting agenda for a weekly project check-in. Topics: progress updates, one unresolved technical issue, and planning for next week. Include time allocations for each section and a 5-minute buffer for questions.

During: Taking Notes

Several tools — including Microsoft Copilot in Teams, Otter.ai, and Fireflies.ai — can join your meeting and take notes automatically. If you're in an in-person meeting, record it on your phone and upload the audio afterward. Even rough bullet points jotted during the meeting can be transformed in minutes.

After: Summarizing the Meeting

PROMPT

Here are my raw notes from a 1-hour project meeting: [PASTE

The 15-Minute Post-Meeting AI Workflow

Right after the meeting, spend 5 minutes jotting down bullet points of everything discussed.

Paste your notes into AI and ask for a meeting summary with decisions and action items.

Use AI to draft the follow-up email to all attendees.

Copy the action items into your task management tool.

Done. Total time: 15 minutes. Everyone has a clear record of what was decided and who's doing what.

PRO TIP

Send the AI-generated summary to attendees within 30 minutes of the meeting ending. This simple habit builds your reputation as someone who gets things done — and eliminates the endless "wait, what did we decide?" confusion.

KEY TAKEAWAY

Meetings are primarily a Digest challenge. Your job is to turn a room full of conversation into clear decisions and action items. AI doesn't attend your meetings — but it processes the output faster than anyone in the room.

TRY THIS TODAY

After your next meeting, spend five minutes jotting down bullet points of what was discussed. Paste them into an AI tool with this prompt: "Turn these rough meeting notes into a clean summary with key decisions and action items with owners." Send it to the attendees. Watch what happens to your reputation.

Chapter Seven

Reports and Documents

From rough notes to polished documents — without the pain.

Reports, proposals, SOPs, policies — these are the documents that run organizations. They also take forever to write. Not anymore.

BEFORE YOU WRITE ANY REPORT — ANSWER THESE 5 QUESTIONS FIRST

Who is the audience, and what do they already know?

What decision will this report support?

What data or facts must be included?

What recommendation or conclusion do you want to make?

What facts need to be verified before going in?

Give AI the answers to these questions as part of your prompt and your output will be dramatically more useful.

Monthly Reports

PROMPT

Write a monthly sales performance report for November. Structure: 1) Executive Summary (3–4 sentences), 2) Key Metrics (table: Revenue, Units Sold, New Customers, Conversion Rate), 3) What Went Well (3 bullet points), 4) Challenges (2–3 bullet points), 5) Recommendations for December (3 action items). Here are the numbers: [PASTE YOUR DATA]

Standard Operating Procedures

PROMPT

Write a standard operating procedure for onboarding a new remote employee. Include: pre-start preparation, day one schedule, week one checklist, 30-day milestones. Format as a numbered step-by-step document a manager can hand directly to a new hire.

Proposals

Executive Summaries

The executive summary is the most-read part of any long report. It needs to be tight, clear, and compelling. It's also often the hardest to write.

PROMPT

Here is a 10-page report: [PASTE REPORT]. Write a one-page executive summary for senior leadership. Focus on the three most important findings and the single most important recommendation.

Editing Existing Documents

PROMPT

Here is a draft report I've written: [PASTE DOCUMENT]. Please: 1) Improve clarity and flow, 2) Tighten any sections that are too wordy, 3) Suggest a stronger opening paragraph.



KEY TAKEAWAY

Before AI: 2–3 hours writing a proposal from scratch. With AI: 15 minutes describing what you need, 10–20 minutes editing the draft, a few minutes polishing. For many people, AI cuts document writing time by half or more — and the drafts are often stronger because you spend your energy editing rather than staring at a blank page.

TRY THIS TODAY

Find a report, memo, or document you need to write this week.

38 Before opening a blank page, answer the five pre-report questions above. Then give AI your answers as the starting prompt. Compare how that draft compares to one you'd write cold.

Chapter Eight

Office Professionals

How AI transforms everyday office work.

REAL WORKDAY: BEFORE & AFTER

Before: Diana, an executive assistant, spent two hours each Monday preparing briefing documents, drafting her executive's correspondence, and summarizing reports that had landed over the weekend.

After: Diana uses a saved prompt to generate briefing documents from a set of bullet points, another prompt to draft correspondence in her executive's voice, and drops PDFs into Claude to get five-bullet summaries in under a minute. Her Monday prep now takes 35 minutes.

Administrative Assistants

PROMPT

I'm preparing a briefing document for my executive's meeting with a potential partner. Here's what I know: [DETAILS]. Create a one-page brief covering: company background, key people, what they do, why this meeting matters, and three suggested talking points.

Managers

Write performance review drafts based on bullet points you provide

Create team communication emails that are clear and motivating

Build structured one-on-one meeting agendas

Draft job descriptions, offer letter templates, and onboarding documents

PROMPT

I need to write a performance review for an employee who had a strong year overall but struggled with meeting deadlines. My notes: [NOTES]. Write a balanced, professional review that acknowledges their strengths, addresses the deadline concern constructively, and sets clear expectations for next year.

Human Resources

Finance

- Translate complex financial data into plain-English narratives
- Draft financial reports with clear executive summaries
- Create budget proposals with supporting rationale
- Build formulas in Excel with AI assistance
- Write variance explanations that are clear and defensible

Customer Service

- Build a template library for the 20 most common customer issues
- Rewrite angry customer emails in a way that de-escalates and resolves
- Create FAQ documents and knowledge base articles from existing tickets
- Draft escalation scripts for difficult calls

PROMPT

Here are 10 common customer complaints we receive: [LIST].
Create a professional, empathetic response template for each one.
Include a place to insert the customer's name and specific situation details.

KEY TAKEAWAY

Think of one document you create at work that follows the same pattern every time — a weekly status update, a meeting recap, a client report. Write an AI prompt that generates a strong first draft of that document. Save it. You've just permanently removed one of your most repetitive tasks.

Chapter Nine

Teachers and Healthcare Workers

Two professions with massive paper loads — and a new way to manage them.

Teachers

Teachers spend hours outside the classroom on work that never shows up in a grade book. AI can cut this time significantly.

IMPORTANT FOR TEACHERS

Before using AI tools in your school work, check your district's policy on AI. Never enter student names, grades, behavioral records, or any personally identifiable student information into a public AI tool. This is both a privacy best practice and, in many cases, a legal requirement under FERPA and similar laws.

Lesson Plans

PROMPT

Create a 50-minute lesson plan for 9th grade English introducing persuasive writing. Include: learning objectives, warm-up (5 min), direct instruction (15 min), guided practice (20 min), independent practice (8 min), and closing reflection (2 min). Engaging, appropriate for mixed ability levels.

Practice Quizzes and Study Guides

PROMPT

Based on this chapter about the American Civil War: [PASTE CONTENT]. Create a 15-question multiple choice quiz with an answer key, and a one-page study guide with the 10 most important concepts.

Parent Communications

PROMPT

Write a professional but warm email to parents explaining we'll be

Healthcare Workers

HIPAA AND HEALTHCARE AI

Healthcare organizations are subject to HIPAA and other privacy regulations that strictly govern how patient information can be shared or processed. Never enter patient names, diagnoses, treatment details, or any protected health information (PHI) into a public AI tool. Only use AI tools that your organization has specifically reviewed and approved for clinical or administrative use. When in doubt, consult your compliance officer.

Important disclaimer: AI is not a substitute for medical judgment, clinical training, or licensed professional advice. The applications here are about documentation, communication, and education — not diagnosis or treatment.

Documentation

Healthcare workers spend enormous time on documentation. AI can help convert rough notes into structured documentation formats.

PROMPT

Convert these clinical notes into a structured SOAP note format:
[PASTE YOUR NOTES — with all patient identifying information removed]

Patient Education Materials

PROMPT

Write a one-page patient education handout explaining [CONDITION/PROCEDURE]. Write at a 6th grade reading level. Include: what it is, what to expect, how to prepare, and who to call with questions. Friendly, reassuring tone.

Chapter Ten

Trades, Field Workers & Small Business Owners

AI isn't just for office workers.

REAL WORKDAY: BEFORE & AFTER

Before: Carlos ran a five-person electrical contracting company. He was good at the work but hated the paperwork. Writing up scopes of work took an hour each. He'd lose jobs because he was slow getting proposals back to clients — not because his price was wrong.

After: Carlos describes the job in plain language, pastes it into ChatGPT, and gets a professional scope of work in two minutes. His proposal turnaround went from days to hours. He won three new clients in his first month using the system.

Scope of Work Documents

PROMPT

Write a detailed scope of work for a residential bathroom renovation. Include: project description, materials and labor included, what is excluded, timeline, payment schedule, and warranty terms. Professional enough to give directly to a homeowner.

Safety Checklists

PROMPT

Create a daily pre-work safety checklist for a commercial electrical crew on new construction. Include categories for: personal protective equipment, tools and equipment inspection, work area setup, communication, and emergency procedures.

Inspection Reports

PROMPT

Here are my field notes from a site inspection: [NOTES]. Write a professional inspection report with: executive summary, findings

Small Business Owners

Running a small business means wearing every hat. AI is like adding a marketing team, a copywriter, and a business analyst — without the payroll.

Marketing Content

PROMPT

Write 5 social media posts for my [TYPE OF BUSINESS]. Each post should highlight a different service, include a call to action, and match this brand voice: [DESCRIBE]. Keep each post under 150 words.

Customer Emails and Newsletters

PROMPT

Write a monthly email newsletter for my landscaping business. Include: a seasonal tip for homeowners, a feature on one of our services, a brief customer testimonial placeholder, and a special offer for the month.

Website Content

PROMPT

Write the homepage content for a [TYPE OF BUSINESS] serving [LOCATION]. Include: a headline, subheadline, short 'About Us' paragraph, a services section with 5 service descriptions (2–3 sentences each), and a call-to-action. Tone: [PROFESSIONAL / FRIENDLY / ENERGETIC].

Chapter Eleven

Research and Data, Fast

Turn hours of digging into minutes of insight.

REAL WORKDAY: BEFORE & AFTER

Before: Priya, a marketing analyst, spent three to four hours each week reading industry reports, competitor blogs, and research papers to stay current. Most of it she skimmed, felt guilty about, and never used.

After: Priya uploads documents to Claude and asks for five-bullet summaries. She uses Perplexity for real-time industry updates. Her weekly research now takes 45 minutes and she arrives at meetings with sharper insights than before.

Research used to mean hours of reading, tabbing between browser windows, and trying to synthesize information from a dozen different sources. AI tools have made this significantly faster. But speed doesn't remove the need to verify. Think of AI as your first pass — it gets you oriented quickly. Your job is to confirm the most important facts before you use them.

Summarizing Long Documents

PROMPT

"Summarize this 20-page report in 5 bullet points for a CEO who has 2 minutes."

"Summarize this document and identify the 3 most important recommendations."

"What are the key arguments the author is making, and do they support them well?"

Industry and Competitor Research

For up-to-date research, Perplexity is your best friend. It searches the web in real time and gives you sourced answers.

PROMPT

PROMPT

I have a spreadsheet tracking monthly sales. Column A is the month, Column B is total sales, Column C is returns. I want Column D to show net sales, Column E to show if we hit our \$50,000 monthly goal (yes/no), and Column F to show the percentage change from the previous month. Write the Excel formulas for each column.

Understanding Your Data

PROMPT

Here is my sales data for the last 12 months: [PASTE DATA]. Identify the top 3 trends, any unusual months, and give me 3 recommendations based on the patterns you see.

Data Cleanup

PROMPT

I have customer data with problems: some names are in ALL CAPS, some have extra spaces, phone numbers are in different formats, and some email addresses appear invalid. Write Excel formulas to standardize the name capitalization, remove extra spaces, and flag emails that don't contain '@'.

Charts and Visual Storytelling

PROMPT

I have monthly revenue data for 3 products over 2 years. I'm presenting to a board that needs to quickly see which product is growing and which is declining. What type of chart should I use, and what should I highlight?

Chapter Twelve

Automate the Repetitive Stuff

Stop doing the same task twice.

This is the fifth D — and for many people, the most powerful one. Delegation used to mean handing work to another person. Now it means building AI systems that handle your most repetitive tasks automatically. You set it up once. It works for you every time after that.

Building a Prompt Library

A prompt library is simply a collection of saved prompts for the tasks you do most often. Think of it as a personal playbook.

Start by listing your five most repetitive writing tasks. Then create a saved prompt for each one — a template with [BRACKETS] for the parts that change each time. Store them in a simple document, a note-taking app, or directly in ChatGPT's Custom Instructions.

EXAMPLE PROMPT LIBRARY ENTRIES

Weekly Status Update: "Write a 3-paragraph weekly status update for [PROJECT]. Progress this week: [PROGRESS]. Blockers: [BLOCKERS]. Plan for next week: [PLAN]. Tone: professional and concise."

Meeting Recap: "Turn these rough meeting notes into a clean summary with key decisions and action items with owners: [PASTE NOTES]."

Custom Instructions

Most major AI tools offer a "Custom Instructions" or "System Prompt" feature that lets you set standing preferences for every conversation. Use this to tell AI your job, your preferred tone, your industry, and any standing rules.

PROMPT

I am a [JOB TITLE] at a [TYPE OF COMPANY] in the [INDUSTRY] industry. I mostly use AI for [PRIMARY USES]. I prefer responses that are [TONE: direct / warm / formal]. Always format longer responses with headers and bullet points. Avoid filler

Your Weekly AI Routine

The most productive AI users don't just use AI when they remember to. They build it into their routine.

Monday: Use AI to review your week's priorities and draft any important emails or communications you need to send.

Daily: Use AI for email drafts, document edits, and quick research. Keep a prompt or two saved for your most common tasks.

After meetings: Use AI to turn your rough notes into a clean summary and action items within 30 minutes.

Friday: Use AI to write a brief summary of what you accomplished this week and what's waiting on Monday. This takes five minutes and makes Monday morning much less chaotic.

As needed: Use AI for research, data analysis, presentations, job-specific documents, and anything else from this book.

Start with just one of these. Once it becomes a habit, add another. Within a month you'll have a routine that saves hours every week.

KEY TAKEAWAY

The workers who get the most out of AI aren't the ones who use it occasionally. They're the ones who build it into their workflow so it becomes invisible — just the way they work.

TRY THIS TODAY

Write your custom instructions for ChatGPT or Claude right now. Open Settings, find Custom Instructions or similar, and fill in: your job title, what you mostly use AI for, your preferred tone, and any standing preferences. That's the single fastest way to improve every AI response you get from this point forward.

Chapter Thirteen

AI Inside Your Favorite Apps

Your existing tools just got a serious upgrade.

You don't always have to switch to a dedicated AI tool. Many of the apps you already use have AI built right in — or have integrations that bring AI directly to your workflow.

Microsoft 365 — Copilot

If your organization has Microsoft 365 Copilot, AI lives inside Word, Excel, PowerPoint, Outlook, and Teams.

Word: Highlight text and ask Copilot to rewrite, summarize, or expand it

Excel: Ask Copilot to analyze your data in plain English — no formulas required

PowerPoint: Describe what you need and Copilot builds a starting deck

Outlook: Copilot summarizes long email threads and drafts replies

Teams: Copilot takes meeting notes and creates action item summaries in real time

Google Workspace — Gemini

Gmail: Use "Help me write" to draft emails from a brief description

Docs: Ask Gemini to write, summarize, or reformat content

Sheets: Ask questions about your data in natural language

Slides: Generate slides from an outline automatically

Other Built-In AI Tools

Notion AI — Built into Notion. Summarizes pages, generates content, creates action items from meeting notes, and fills in templates automatically.

Canva AI — Generates images, removes backgrounds, resizes designs for different platforms, and creates entire presentation decks from a text description.

Slack AI — Summarizes channels you missed, recaps long threads, and helps you catch up on conversations quickly.

THE BIGGER PICTURE

You don't need to master every AI tool. Pick the two or three platforms where you spend the most time and get really good at their AI features. That focused approach gives you 80% of the benefit with 20% of the learning curve.

IMPORTANT: CHECK YOUR ORGANIZATION'S LICENSE

Many of the AI features described in this chapter — Microsoft Copilot, Gemini for Workspace, Notion AI, Slack AI — require paid business plans or administrator-level access. Before assuming you have access, check with your IT department or manager. Some features may need to be enabled by an administrator.

KEY TAKEAWAY

This chapter is about accessing the entire 5D system without leaving the apps you already use. When AI is built into your tools, every D becomes available without switching context or learning something new.

TRY THIS TODAY

Open one app you use every day — Outlook, Word, Gmail, Docs, or Slack. Look for an AI or Copilot or "Help me write" button anywhere in the interface. If you find one, try it on a real task right now. You may already have AI built into a tool you've been using for years.

Chapter Fourteen

The Future of Work — And Your Place In It

The world is changing. Here's how to stay ahead.

Let's talk honestly about where all of this is going.

AI is not slowing down. The tools you use today will be more powerful in twelve months than they are right now. Things that currently require human effort — scheduling, basic analysis, routine communications, data entry — will become increasingly automated.

This isn't a reason to panic. It's a reason to prepare.

AI Agents: The Next Wave

Right now, AI is a tool you use — you type in a prompt, it gives you output. The next wave is AI agents: AI that doesn't just respond to prompts but takes actions on your behalf. These systems can browse the web, send emails, update spreadsheets, book meetings, and complete multi-step tasks automatically.

We're in the early stages of this right now. They're not perfect yet — they make mistakes and require supervision — but they're improving rapidly. The workers who understand how to direct AI agents will be extraordinarily valuable.

The Human Skills That Matter More Than Ever

Here's the counterintuitive reality: as AI gets better at doing more things, certain human skills become more valuable, not less.

Judgment. AI can generate a hundred options. It takes a human with experience and context to choose the right one.

Relationships. Business runs on trust. Trust is built in human interactions: a lunch meeting, a difficult conversation handled with grace, a mentor who shows up when things get hard. No AI replaces that.

Creative Vision. AI is excellent at executing creative tasks once it knows what you want. But deciding what to make, what story to tell, what problem to solve — that creative vision is still fundamentally human.

Ethical Reasoning. As AI becomes more powerful, the decisions

How to Stay Valuable in an AI Workplace

Learn to give clear instructions. The ability to direct AI precisely is a skill that will matter more every year.

Learn to check AI output. Critical thinking — knowing when something is wrong or incomplete — becomes more valuable as AI becomes more capable.

Know your company's data rules. Being the person who uses AI responsibly is a competitive advantage, not a limitation.

Build reusable workflows. People who systematize their AI use — prompt libraries, templates, saved projects — multiply their output over time.

Keep improving your human judgment. Experience, relationships, and contextual wisdom are things AI cannot replicate. Invest in them.

Building a Personal Learning Habit

Spend 15 minutes a week trying one new AI feature or tool.

Follow one or two AI newsletters to stay current without feeling overwhelmed.

After each significant AI-assisted task, ask yourself: what worked, what didn't, and what would I do differently?

Share what you learn with your team. Teaching something is the fastest way to master it — and it builds your reputation as the go-to person on AI.

KEY TAKEAWAY

It's not about knowing every AI tool. It's about staying curious, staying adaptable, and continuously raising the quality of your work. Human judgment plus AI capability is the most powerful professional combination available right now.

Bonus Section

75+ Ready-to-Use Prompts

Use these prompts as starting points. Replace anything in [BRACKETS] with your specific details. The more specific you are, the better your results.

Email

"Write a professional email to [RECIPIENT] requesting [ACTION]. Context: [SITUATION]."

"Rewrite this email to sound more [formal / casual / warm / assertive]: [PASTE EMAIL]."

"Write a follow-up email to [RECIPIENT]. I sent [DOCUMENT] on [DATE] and haven't heard back."

"Write a response to this complaint email: [PASTE EMAIL]. Tone: empathetic and solution-focused."

"Write an email announcing [NEWS] to my team. Keep it clear, positive, and invite questions."

"Write a cold outreach email introducing my [PRODUCT/SERVICE] to [TARGET AUDIENCE]. Keep it brief."

"Write an apology email to [CLIENT/COLLEAGUE] about [SITUATION]. Be sincere and offer a solution."

Meetings

"Create a [LENGTH]-minute meeting agenda for [MEETING TYPE]. Topics: [LIST TOPICS]."

"Turn these rough meeting notes into a clean summary with decisions and action items: [PASTE NOTES]."

"Write a follow-up email after today's meeting. Key decisions: [LIST]. Action items: [LIST]."

"Create a structured one-on-one meeting template for a manager and their direct report."

"Write talking points for a difficult conversation I need to have with [PERSON] about [TOPIC]."

"Summarize this meeting transcript into the 5 most important takeaways: [PASTE TRANSCRIPT]."

Excel and Data

"Write Excel formulas to [DESCRIBE WHAT YOU NEED] in a spreadsheet where [DESCRIBE LAYOUT]."

"I have this data: [PASTE DATA]. What are the 3 most important insights, and what would you recommend?"

"Write a formula to clean up this data problem: [DESCRIBE PROBLEM]."

"What type of chart best shows [TYPE OF DATA] for [AUDIENCE], and why?"

"Explain what this formula does in plain English: [PASTE FORMULA]."

HR and Management

"Write a job description for [ROLE] at [TYPE OF COMPANY]. Include responsibilities, requirements, and a culture statement."

"Write a performance review for an employee who [DESCRIBE PERFORMANCE]. Notes: [YOUR NOTES]."

"Create a 30-60-90 day onboarding plan for a new [ROLE]."

"Write 10 structured interview questions for [ROLE] that assess [SPECIFIC SKILLS]."

"Draft an email announcing a [POLICY CHANGE] to the team. Be clear, positive, and address likely concerns."

Marketing and Sales

"Write 5 social media posts for [PLATFORM] about [PRODUCT/SERVICE/TOPIC]. Brand voice: [DESCRIBE]."

"Write a product description for [PRODUCT] targeting [AUDIENCE]. Highlight: [KEY BENEFITS]."

70 "Write a sales email introducing [PRODUCT/SERVICE] to [TARGET CUSTOMER]. Pain point: [PAIN POINT]."

"Create a content calendar for [MONTH] with 12 social media post ideas for [BUSINESS TYPE]."

Project Management

"Create a project plan outline for [PROJECT]. Include phases, milestones, and dependencies."

"Write a project status update for [PROJECT] for [AUDIENCE]. Status: [STATUS]. Issues: [ISSUES]."

"Identify the top 5 risks for this project: [DESCRIBE PROJECT]. Rate each by likelihood and impact."

"Create a stakeholder communication plan for [PROJECT]. Stakeholders: [LIST]."

"Write a project kickoff meeting agenda for [PROJECT]. Team: [TEAM SIZE]. Duration: [LENGTH]."

"Convert this list of tasks into a prioritized action list using urgency and impact: [PASTE TASKS]."

Research and Learning

"Explain [COMPLEX TOPIC] as if I'm a smart person with no background in this field."

"What are the top 5 trends in [INDUSTRY] right now, and what do they mean for [MY ROLE/BUSINESS]?"

"Compare [OPTION A] and [OPTION B] on [CRITERIA]. Help me make a decision."

"Summarize this article in 3 sentences and tell me if the argument is well-supported: [PASTE ARTICLE]."

"Create a learning plan for me to become proficient in [SKILL] in [TIMEFRAME]. I currently know: [LEVEL]."

"What are the strongest arguments for and against [DECISION/POSITION]?"

Small Business

"Write a scope of work for [SERVICE/PROJECT] to give to a client. Include what's included and excluded."

"Create a pricing strategy for [SERVICE]. Current cost: [COST]."

The Prompting Cheat Sheet

ROLE: "You are an experienced [ROLE]..."

TASK: "Write / Create / Summarize / Analyze / Edit..."

CONTEXT: "The situation is... The audience is... The background is..."

REQUIREMENTS: "Make sure to include... Avoid... Keep the tone..."

FORMAT: "Format this as a [DOCUMENT TYPE]. Use [bullets / paragraphs / table]..."

AI Vocabulary Glossary

Prompt — The instructions or question you type into an AI tool.

Hallucination — When AI confidently generates false or made-up information.

Context window — The amount of text an AI can process in a single conversation.

Iteration — The process of refining AI output through follow-up prompts.

AI agent — An AI system that takes actions autonomously (browsing the web, sending emails, etc.).

Large Language Model (LLM) — The underlying technology behind most conversational AI tools.

Token — A unit of text (roughly $\frac{3}{4}$ of a word) that AI uses to measure and process content.

Temperature — A setting that controls how creative vs. predictable an AI's output is.

Conclusion

**Start Before You're
Ready**

Here's the truth: most people will read this book, find it genuinely useful, feel motivated — and then not change much about how they work.

Not because they didn't learn anything. But because starting something new feels awkward and uncertain, and it's easier to fall back into old habits. Don't let that be you.

You don't have to overhaul your entire workflow tomorrow. Start with one task. Just one. The next email you have to write — try using AI for the draft. See what happens. It probably won't be perfect. That's fine. Edit it, learn from it, try again.

Within a week of consistent use, the awkwardness will fade. Within a month, it will feel natural. Within three months, you'll wonder how you ever worked without it.

Your 5D System Is Already Built

You now have everything you need to apply the 5D Work System to your job. Look back at your work week. Find one task in each category:

One thing you **Draft** regularly — an email, a report, a document

One thing you **Digest** regularly — a meeting, a report, an inbox

One decision you could think through better with AI as a partner

One thing you **Design** repeatedly — a checklist, a workflow, a template

One thing you could **Delegate** to a saved prompt forever

Start there. Five tasks. Five prompts. Five minutes of setup that saves hours every week. That's the system. It's simple because simple is what gets used.

Build Your Own AI Toolkit

As you work through the tools and techniques in this book, start building your personal collection:

A prompt library — your saved prompts for the tasks you do most often

A preferred tool shortlist — the two or three AI tools that fit your workflow best

A template library — documents you use regularly that can be semi-automated

This toolkit is yours. It grows with you. And it becomes more valuable the more you add to it.

Keep Learning

AI is a fast-moving field. What's true today may be different in six months. The specific tools will change. The underlying skill — knowing how to direct AI, how to evaluate its output, how to integrate it into your work — those skills transfer across any tool.

Stay curious. Experiment. Make mistakes. Share what you learn.

The workers who thrive in the coming years won't be the ones who feared AI, or the ones who blindly trusted it. They'll be the ones who learned to work with it thoughtfully — combining human judgment with AI capability to do things that neither could do alone.

That's you.



Draft. Digest. Decide. Design. Delegate.

Now go make some time back.

Also in the AI Guide Series

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AI Won't Replace You

But Someone Using AI Might

Book Two

AI for Everyday Life

50 Practical Ways to Save Time, Solve Problems, and Think Better with AI

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About the Author

Patrick Thomas is a facilities management professional, veteran, and technology enthusiast who helps everyday people understand practical applications of artificial intelligence.

His goal is to make emerging technologies approachable, practical, and useful for ordinary people — without requiring a technical background. He writes from experience, not theory: the tools, prompts, and strategies in his books are the ones he uses every day.

Patrick served in the United States military and brings a veteran's appreciation for clear, actionable guidance to everything he writes.

AI at Work is part of the AI Guide Series — a collection of accessible guides designed to help readers of all backgrounds benefit from artificial intelligence in their daily lives.

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