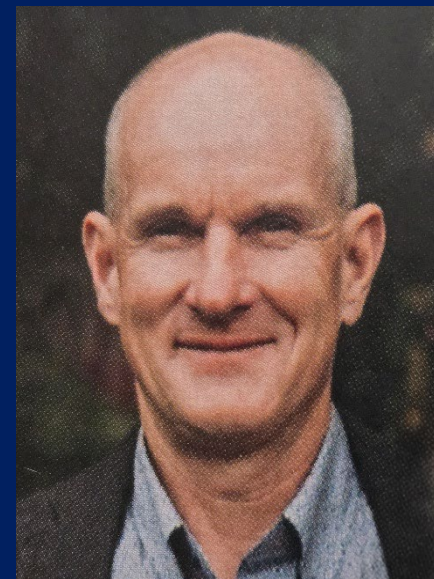


Session 4

Architecting Intelligence



Mohammad Bhojani,
PD Day, Co-Chair and
Facilitator, ISC



Michael Nash,
Co-Founder, Practical AI

Architecting Intelligence

Deploying AI in Everyday Tasks

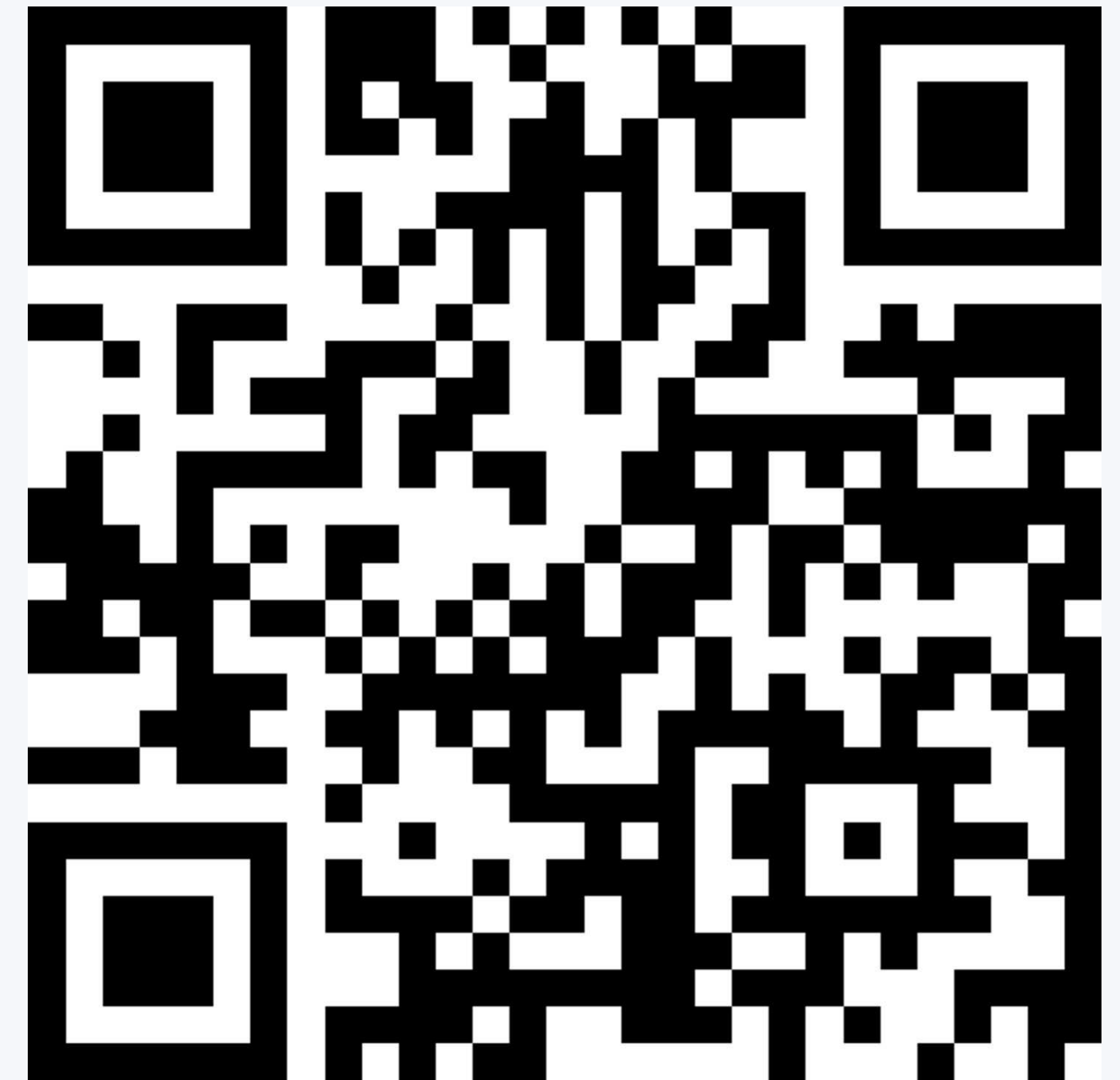
English: <https://www.youtube.com/watch?v=OWzjV1J91uE>

Poll Questions

How often do you use AI tools?

What are your use cases for AI?

What are your biggest concerns when using AI?



Survey QR Code



How often do you use AI tools (e.g. CoPilot, ChatGPT, Gemini or a departmental Large language model)? / À quelle fréquence utilisez-vous des outils d'IA (par exemple CoPilot, ChatGPT, Gemini ou un modèle linguistique départemental à grande échelle) ?



What is your #1 Use Case for AI? / Quel est votre cas d'utilisation n° 1 pour l'IA ?



What is your biggest concern when using AI? / Quelle est votre principale préoccupation lorsque vous utilisez l'IA ?

Presentation Objectives

- **Redefine AI's role:** Discover how to turn AI into your “supercharged analyst-in-training” — boosting productivity while keeping controls tight.
- **Master a reliable prompt formula:** Learn a simple, repeatable recipe that creates consistently strong outputs.
- **Add the “secret sauce”:** Unlock pro-level prompt techniques that dramatically level-up accuracy, depth, and creativity.
- **Experience it live:** Watch real, finance-focused demos—including “visual storytelling” techniques that drive clearer, faster decisions.
- **Build skills hands-on:** Practice crafting, improving, and stress-testing prompts—walk away with reusable templates you can use tomorrow.



How Technology Transforms Daily Life

Speed with confidence – Move faster without sacrificing sound judgment.

Clarity with control – Gain sharper insights while maintaining accountability.

Decisions with momentum – Act sooner without giving up ownership.

Stronger narratives – Tell better stories powered by data, without losing your authentic voice.

AI is like a Confident Intern

Strengths

- Drafts quickly
- Summarizes complex material into digestible insights
- Restructures messy content into clean narratives
- Formats with speed
- Iterates endlessly —no fatigue, no ego

Risks

- Sounds confident even when uncertain
- May invent details or fill gaps incorrectly
- Has weak judgment —requires human oversight
- Can miss nuance without clear instructions





ROLE

Who is the AI?



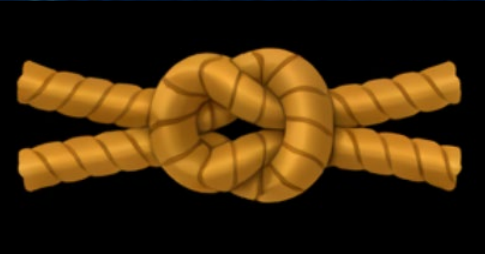
GOAL

What does "done" look like?



CONTEXT

What does it need to know?



CONSTRAINTS

What must it avoid?



FORMAT

How should the answer look?



VERIFY

How do you verify the result?

Proven Recipe



ThePhoto by PhotoAuthor is licensed under CCYSA.

Demo Session

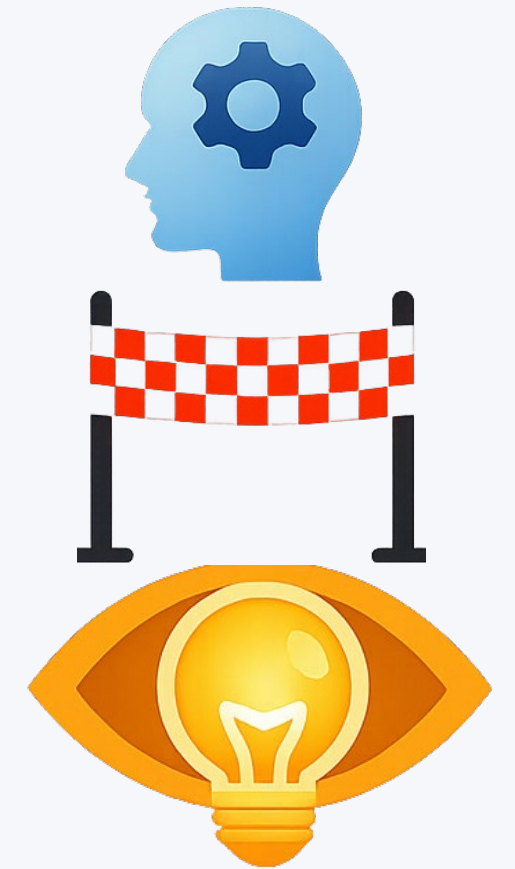


3 Ingredients

Role – CT-FIN

Goal – 1 page briefing

Context – Variance, over budget by \$0.12M



PROMPT:

1) Role: "You are a CT-FIN financial analyst supporting an ADM-level briefing."

2) Goal: "Draft a 1-page briefing note on a material budget variance."

3) Context: "Actual spend is \$1.12M vs budget \$1.00M for IT operations this month (+\$120k / +12%). Known factors: contractor usage increased due to an outage; license renewal timing shifted. Decision needed: whether to reallocate within O&M or request in-year adjustment. Deadline: 4pm today."

ChatGPT 5.2 Thinking ▾



Temporary Chat

This chat won't appear in your chat history, and won't be used to train our models.

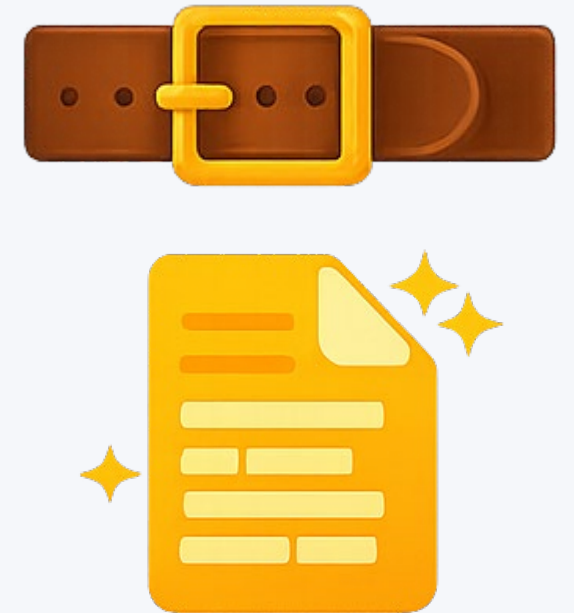
1) Role: "You are a CT-FIN financial analyst supporting an ADM-level briefing."
2) Goal: "Draft a 1-page briefing note on a material budget variance."
3) Context: "Actual spend is \$1.12M vs budget \$1.00M for IT operations this month (+\$120k / +12%).
Known factors:
contractor usage increased due to an outage; license renewal timing shifted. Decision needed:
whether to
reallocate within O&M or request in-year adjustment. Deadline: 4pm today."

+ ⏪ Extended thinking ▾



2 Additional Ingredients

Constraints – guardrails and guidelines
Format – Bulleted output, very concise.



PROMPT ADDITIONS:

4) Constraints: Do not invent numbers or events. Label confirmed facts vs hypotheses. If information is missing, write 'unknown'. Include assumptions, a confidence rating (Low/Med/High), and a validation checklist for the manager.

5) Format: Use ICAR headings. Under Analysis, include: (1) top 3 drivers, (2) implications, (3) risks + mitigations table. Under Recommendation, provide Options A/B/C with tradeoffs and a recommended option with rationale. Output as bullets, max 20 words."

ChatGPT 5.2 ▾



Temporary Chat

This chat won't appear in your chat history, and won't be used to train our models.

PROMPT:

1) Role: "You are a CT-FIN financial analyst supporting an ADM-level briefing."

2) Goal: "Draft a 1-page briefing note on a material budget variance."

3) Context: "Actual spend is \$1.12M vs budget \$1.00M for IT operations this month (+\$120k / +12%)."

Known factors:

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4) Constraints: Do not invent numbers or events. Label confirmed facts vs hypotheses. If information is missing, write 'unknown'. Include assumptions, a confidence rating (Low/Med/High), and a

+



Turn “answers” into reviewable working papers.

1

Assumptions + uncertainty

What did it assume? What is unknown? What would change the answer?

2

Evidence + traceability

What documents/data support this? What should be cited or linked?

3

Validation checklist

What should a reviewer verify before this goes to leadership?



PROMPT ADDITIONS:

List assumptions + unknowns, and rate confidence (Low/Med/High).

List evidence needed + where to find it (data sources, policies).

Produce a reviewer checklist + red flags.

Do not add new facts.

ChatGPT 5.2 



Temporary Chat




This chat won't appear in your chat history, and won't be used to train our models.

Label confirmed facts vs hypotheses. If information is missing, write 'unknown'. Include assumptions, a confidence rating (Low/Med/High), and a validation checklist for the manager.5) Format: Use ICAR headings. Under Analysis, include: (1) top 3 drivers, (2) implications, (3) risks + mitigations table. Under Recommendation, provide Options A/B/C with tradeoffs and a recommended option with rationale. Output as bullets, max 20 words."

Before finalizing, switch to verification mode:

- 1) List assumptions + unknowns, and rate confidence (Low/Med/High).
- 2) List evidence needed + where to find it (data sources, policies).
- 3) Produce a reviewer checklist + red flags.

Do not add new facts.

Goal

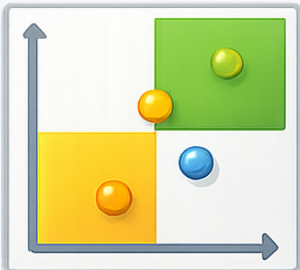
Tell financial stories, visually in a way that is meaningful to the intended audience

Expected Outcome

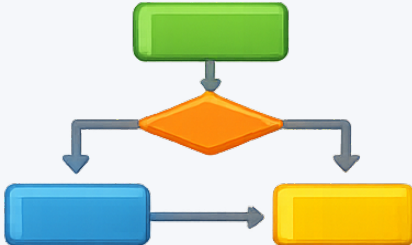
I expect the AI to tell me about some visual options that might assist in telling my story



GRAPHS



QUADRANT CHARTS



FLOWCHARTS



TIMELINES



GANTT CHARTS



PREDICTIVE ANALYTICS

After your verification step, can you produce the recommendations in a visual way so that people pay attention. Please output the results as a mermaid markdown – remember to make the output render safe, no (or) or any other characters that will render improperly.



ChatGPT 5.2 ▾



Temporary Chat

This chat won't appear in your chat history, and won't be used to train our models.

Output as bullets, max 20 words.

Before finalizing, switch to verification mode:

- 1) List assumptions + unknowns, and rate confidence (Low/Med/High).
- 2) List evidence needed + where to find it (data sources, policies).
- 3) Produce a reviewer checklist + red flags.

Do not add new facts.

After you are done with the above, produce the recommendations in a visual way so that people pay attention. Please output the results as a mermaid markdown – remember to make the output render safe, no (or) or any other characters that will render improperly. Choose whatever visualization you deem appropriate, don't ask me any follow-up questions.





ChatGPT 5.2 ▾

How about a quadrant chart instead?

Temporary Chat ⋮



Visual Recommendation Summary

```
mermaid
```

Copy code

```
quadrantChart
```

```
title Budget Variance Decision Framing  
x-axis Low Transparency --> High Transparency  
y-axis Low Operational Impact --> High Operational Impact
```

```
quadrant-1 High Transparency High Impact  
quadrant-2 Low Transparency High Impact  
quadrant-3 Low Transparency Low Impact  
quadrant-4 High Transparency Low Impact
```

```
Option A Reallocate Within OM: [0.3, 0.6]  
Option B In Year Adjustment: [0.8, 0.4]  
Option C Hybrid Approach: [0.7, 0.5]
```



+ Ask anything



The screenshot shows the Microsoft Excel application window. The title bar indicates the file name is "GC_Messy_Data_Cleanup_Demo_v2_LowErrorRates.xlsx" and it is saved to the PC. The ribbon is set to the "Home" tab, showing options for Clipboard, Font, Alignment, Number, Styles, Cells, and Editing. The task pane on the right includes "Comments", "Share", "Sensitivity", "Add-ins", and "Copilot".

	A	B	C	D	E	F	G	H
1	Vendor_ID	Supplier_Name	Legal_Name	Business_Number_G STHST	Address_Line1	City	Province	Postal_Code
185	V100183	Red River Medical Supplies Co.	Red River Medical Supplies Co.	957382539RT3120	4011 Bloor St	Winnipeg	MB	J8X 1K1
186	V100184	Horizon Signage Inc.	Horizon Signage Inc.	406145908RT6812	224 Wellington St	Regina	SK	X5R 6A1
187	V100185	Silver Birch Industrial Safety Incorporated	Silver Birch Industrial Safety Incorporated	500069862RT6092	5891 King St	Regina	SK	E9E 2M8
188	V100186	Evergreen Paper Products Inc.	Evergreen Paper Products Inc.	036230353RT1517	7044 King St	Fredericton	NB	B9H 3C4
189	V100187	Boreal Consulting Incorporated	Boreal Consulting Incorporated	418732246RT5314	8423 Rideau St	Gatineau	QC	M8B 5B1
190	V100188	St. Lawrence Signage Ltd.	St. Lawrence Signage Ltd.	647137036RT1655	1448 Wellington St	Calgary	AB	B6S 6C2
191	V100189	Bluewater Transit Solutions Inc.	Bluewater Transit Solutions Inc.	687431797RT4784	7768 Queen St	Gatineau	QC	B1E 5K0
192	V100190	Cascadia Print & Copy Co.	Cascadia Print & Copy Co.	642772021RT8912	2555 Bloor St	Halifax	NS	A2B 5C4
193	V100191	Evergreen Data Center Services Limited	Evergreen Data Center Services Limited	834837525RT5812	4555 Bloor St	St. John's	NL	B8M 4E7
194	V100192	Horizon Construction Limited	Horizon Construction Limited	684460475RT3489	5029 Rideau St	Fredericton	NB	P0L 8B5
195	V100193	West Coast Construction Co.	West Coast Construction Co.	355712715RT3229	718 Bloor St	Winnipeg	MB	N2H 2P4
196	V200000	Boreal Consulting Incorporated	Boreal Consulting Incorporated	975985565RT2875	2646 Rideau St	Fredericton	NB	P4L 2C9
197	V200001	Boreal Consulting Incorporated	Boreal Consulting Incorporated	975985565RT2875	2646 Rideau St	Fredericton	NB	P4L 2C9
198	V200002	West Coast Signage Ltd.	West Coast Signage Ltd.	463540134RT9686	9805 Main St	Vancouver	BC	C5C 2Y1
199	V200003	West Coast Signage Ltd.	West Coast Signage Ltd.	463540134RT9686	9805 Main St	Vancouver	BC	C5C 2Y1
200	V200004	Bluewater Interpretation Services Incorporated	Bluewater Interpretation Services Incorporated	251557883RT4656	6930 King St	Halifax	NS	N8L 8P3
201	V200005	Bluewater Interpretation Services Incorporated	Bluewater Interpretation Services Incorporated	251557883RT4656	6930 King St	Halifax	NS	N8L 8P3
202								
203								
204								
205								
206								
207								
208								
209								

The bottom of the window shows the task bar with the following tabs: "01_Suppliers_OCR" (selected), "02_AP_Invoice_Lines_OCR", "03_Travel_Claims_OCR", and "04_GL_JE". The status bar at the bottom indicates "Ready", "Accessibility: Good to go", "Count: 2949", "Display Settings", and "100%" zoom.

B0 — Global Copilot contract (use once per workbook)

Role
You are an Excel data quality assistant supporting GC financial workflows.

Goal
Create cleaned sheets and issues logs without changing originals.

Context
This workbook contains messy operational/financial data with inconsistent formatting, codes, dates, and amounts.

Constraints

- Don't modify the original sheet.
- Create new sheets for outputs.
- Don't guess ambiguous dates; flag them.
- Don't invent missing values.

Format
For the active sheet, create:

- CLEAN_<sheetname>
- ISSUES_<sheetname> (Row, Column, Issue, Original, Suggested Fix, Confidence)

Verify
Add a summary at the top of ISSUES_<sheetname>: total issues, issues by type, and % rows with issues.

Chat Sidebar:

Need insights? Just ask

Help me to fill

Analyze this workbook and give me interesting data insights

How can Copilot help with this workbook?

Summarize the data in this workbook

See more

Copilot Chat (Basic)

Top Tip #1 - Tune your Settings

Settings

- General
- Data controls
- Personalization**
- Agents

← Custom Instructions

Add details you want Copilot to know about you and specify how you would like it to format its responses.

Feel free to include details about your interests, preferences, goals, or any specific context that could help Copilot deliver the best possible assistance and personalized insights.

Custom Instructions

Cancel Save

Settings

- General
- Notifications
- Personalization**
- Apps
- Schedules
- Data controls
- Security
- Parental controls
- Account

Base style and tone

Set the style and tone of how ChatGPT responds to you. This doesn't impact ChatGPT's capabilities. Default ▾

Characteristics

Choose additional customizations on top of your base style and tone.

- Warm Default ▾
- Enthusiastic Default ▾
- Headers & Lists Default ▾
- Emoji Default ▾

Custom instructions

Address me as "Mike."

Default to structured, point-form answers with clear headings. Avoid long paragraphs.

Use tables for comparisons, mappings, scoring matrices, and

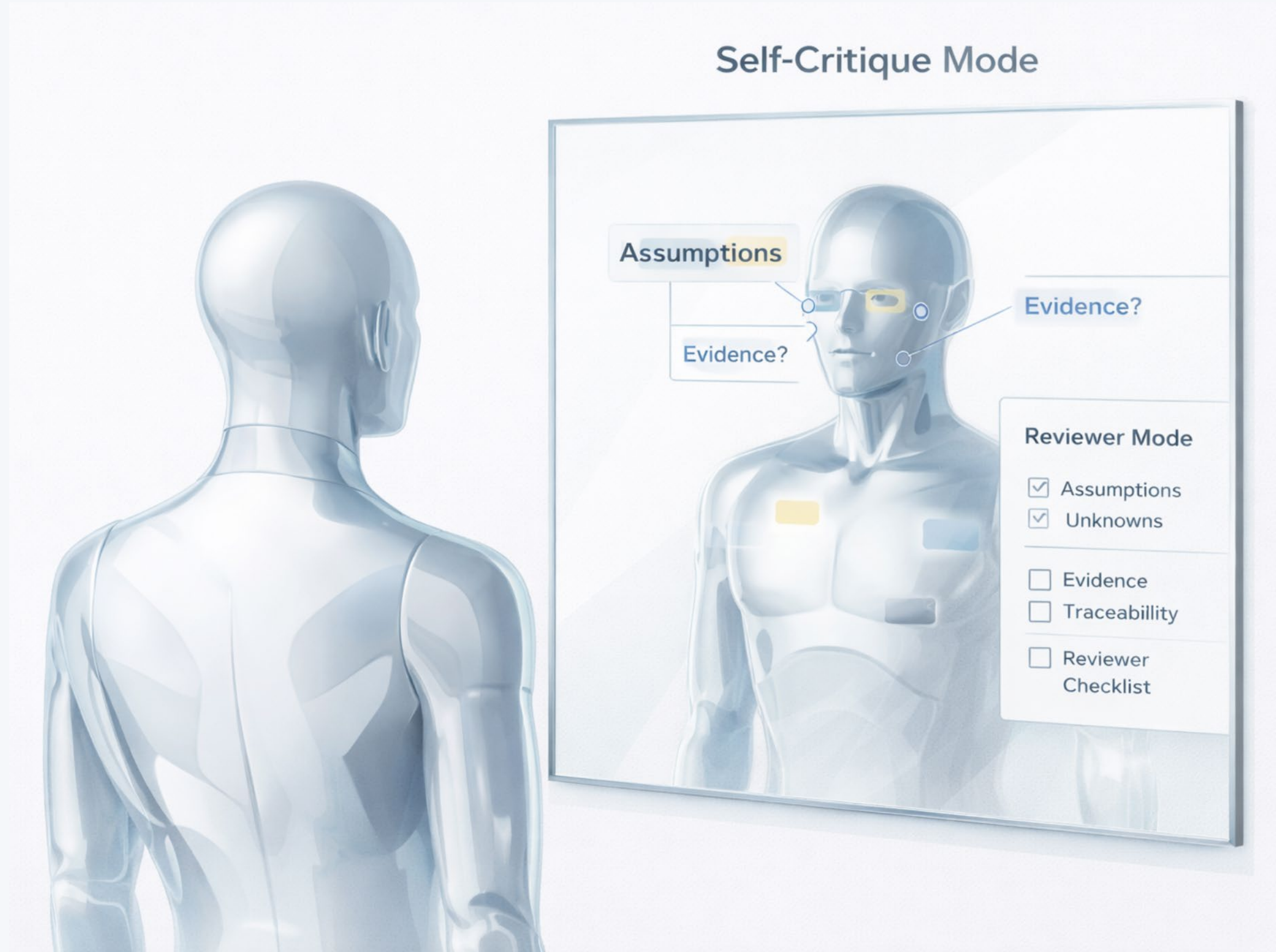
Memory ? Manage

Reference saved memories
Let ChatGPT save and use memories when responding.

Reference chat history
Let ChatGPT reference all previous conversations when responding.

ChatGPT may use Memory to personalize queries to search providers, such as Bing. [Learn more](#)

Top Tip #2 – AI Self-Critique



Top Tip #3 – Seek Other Opinions



Cross-Model Perspective Strengthens Judgment

Q&A Session





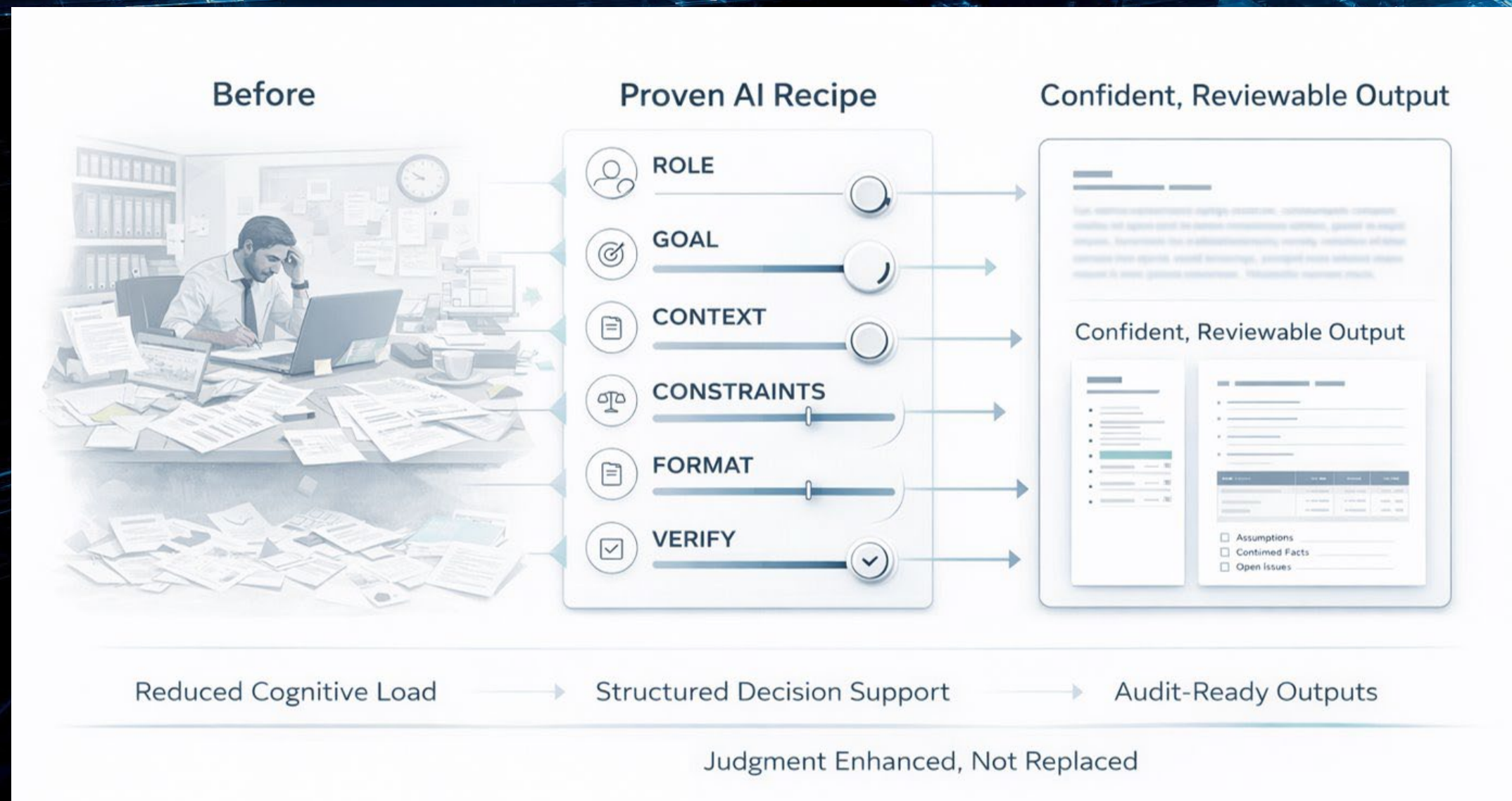
Audience Q&A

Hands -On Activity

- Practice effective AI interaction.
- Use the recipe for structure and control.
- Focus on creating reviewable, audit -friendly finance outputs.
- Review and improve together



Thank You!



Connect with me on LinkedIn for additional resources ...

Or mike@practicalai.ca

Thank You

