

AI Task Automation Exercise

Goal: Identify high-impact opportunities to integrate generative AI (ChatGPT and Microsoft 365 Copilot) into daily workflows, and discern which tasks should **not** be automated. Focus on *business value* – time savings, cost reduction, and output quality improvements.

General Prompt

You are an AI Operations Analyst. Your job is to map AI automation opportunities for the role I provide.

INPUT – JOB DESCRIPTION

<<<

[Paste your job description here]

>>>

OBJECTIVE

- 1) Break the role into atomic tasks (10–25), each phrased as verb + object (e.g., “draft product email,” “reconcile invoices,” “present monthly results”).
- 2) Score each task on:
 - Repeatability (R, 0–5)
 - Structure/Standardization (S, 0–5)
 - Tool Fit for ChatGPT/Microsoft 365 Copilot (T, 0–5)
 - Data Availability (DA, 0–5)
 - Data Sensitivity (D, 0–5) ← penalize
 - Required Accuracy/Criticality (A, 0–5) ← penalize
 - Human Nuance/Relationship (H, 0–5) ← penalizeCompute AUTOMATION INDEX = (R + S + T + DA) – (D + A + H). Range ≈ –15 ... +20.
- 3) Classify each task:
 - FULLY Automatable: Index ≥ +10 AND each of D, A, H ≤ 2.
 - PARTLY Automatable: +3 ... +9 OR any of D, A, H = 3.
 - NOT Automatable: ≤ +2 OR any of D, A, H ≥ 4.
- 4) For FULLY Automatable tasks:
 - Provide a step-by-step “How to automate” plan (1–5 steps).
 - Provide 2–3 sample prompts:
 - a) ChatGPT prompt(s)
 - b) Microsoft 365 Copilot prompt(s) for Word/Excel/PowerPoint/Outlook (when applicable)
 - Specify expected output format(s) (e.g., table, email draft, slide outline) and simple quality checks.
- 5) For PARTLY Automatable tasks:
 - Propose a Human-in-the-Loop workflow (who does what, when).

- Provide 1-2 prompts to accelerate the AI portion.
- List risks + guardrails (e.g., privacy, hallucinations, compliance).

6) For NOT Automatable tasks:
- Explain why (nuance, trust, critical decisions, sensitive data).
- Suggest supportive uses of AI (research briefs, checklists, first-draft memos).

7) ROI snapshot for the Top-5 opportunities (FULLY or PARTLY):
- Baseline time (hrs/task), AI-assisted time, hours saved per month.
- Simple ROI note: "If staff cost is \$X/hr, estimated monthly savings \approx hours_saved \times \$X."

CONSTRAINTS & SAFETY
- Do NOT invent private data. Assume public, non-sensitive inputs unless indicated.
- For any high-stakes output, require human review.
- If key info is missing, ask up to 3 concise clarifying questions BEFORE proceeding.

OUTPUT FORMAT
A) Summary table (one row per task):
| Task | R | S | T | DA | D | A | H | Automation Index | Class |
Primary Tooling | Quick Win? (Y/N) |
B) Sections:
1) FULLY Automatable – per task: plan + sample prompts + checks
2) PARTLY Automatable – per task: HITL workflow + prompts + risks
3) NOT Automatable – per task: rationale + supportive AI uses
4) Top-5 ROI snapshot (bullets)
C) End with "Next-Week Pilot" – 2 quick wins with the exact prompts to try.

Now ingest the job description above and produce the deliverable.

Worked out Example

Example job (abridged):

“Marketing Manager at a Singapore SME. Own weekly newsletter, social media calendar, basic design of assets, monthly performance report (Excel + GA4), quarterly campaign planning with sales, vendor coordination, and management presentations.”

Excerpt of resulting classification (3 tasks):

- **Task:** Draft weekly newsletter
Class: FULLY Automatable
Why: High repeatability; templated; low sensitivity; AI fits drafting.
ChatGPT prompt:
“You are a marketing copywriter. Draft a 200-word newsletter announcing our ‘Back-to-Work’ sale for SMEs. Audience: office managers. Tone: friendly, concise. Include a 3-bullet highlights section and a clear CTA to book a demo.”
Copilot (Word) prompt:
“Create a one-page newsletter draft using the outline in ‘BTOW_Newsletter_Outline.docx’. Add a 3-bullet highlights section and a CTA paragraph.”
Quality checks: Reads in ≤ 200 words; 1 CTA; no claims without source.
- **Task:** Compile monthly marketing performance report (Excel + GA4)
Class: PARTLY Automatable
HITL workflow:
 1. **Excel Copilot:** “From ‘Mktg_Metrics_Q3.xlsx’, identify top 3 channels by leads and chart MoM trend.”
 2. **ChatGPT:** “Summarize these findings for executives in 120 words—plain English, no jargon.”
 3. **Human:** Validate figures, add commentary, finalize.
Risks/guardrails: Data correctness; ensure secure data handling.
- **Task:** Present campaign plan to management, field live questions
Class: NOT Automatable
Why: High human nuance, strategic judgment, live interaction.
Supportive AI use: Draft slide outline; rehearse Q&A with a mock stakeholder prompt.
-

Top-5 ROI snapshot (example math):

- Newsletter: 1.0h \rightarrow 0.2h (save 0.8h/week \approx 3.2h/month).
 - Performance report: 6.0h \rightarrow 3.0h (save 3h/month).
 - Social calendar (drafts): 2.0h \rightarrow 0.7h (save 1.3h/month).
- If staff cost \approx \$60/h, monthly savings $\approx (3.2 + 3 + 1.3) \times \$60 \approx$ **\$456**.

Step-by-Step Instructions

1. **Brainstorm Tasks (10 min):** As a group, list routine or time-consuming tasks in your work. Use sticky notes or the table below to jot down tasks in two categories:
 - *Potentially AI-Suitable:* e.g. repetitive report writing, content creation, data summarization.
 - *Not Suitable for AI:* e.g. tasks requiring complex judgment, a personal touch, or handling of sensitive data.

Refer to the examples by job function in the next section for inspiration.
2. **Evaluate AI Suitability & ROI (10 min):** For each task identified, discuss the following and fill the checklist table:
 - **Repeatability:** Is the task frequent and process-driven? (High repeatability favors AI for efficiency gains.)
 - **Creativity vs. Precision:** Does the task benefit from creative drafting or does it demand flawless accuracy? (AI excels at drafting creative content, but critical calculations may need human verification.)
 - **Data Sensitivity:** Would using AI involve confidential data? (Avoid sharing sensitive data in public AI tools – consider anonymizing or using secure in-house AI for such cases.)
 - **Required Accuracy:** What are the consequences if the AI output is wrong? (Low-stakes content can be AI-generated with review, whereas high-stakes tasks might remain manual or require strict validation.)
 - **ROI Potential:** Estimate the potential benefit – e.g. “*Could AI save 3 hours of my weekly report prep?*” or “*Would responses be 50% faster?*” Quantify time saved, cost reduction, or quality improvement where possible. Mark each task as **AI-suitable or not**, and note the expected ROI (time saved, improved output quality, etc.).
3. **Hands-On Prompt Testing (5-10 min):** Choose one promising **AI-suitable** task from your list. As a group, write a sample prompt and test it live using ChatGPT (or Microsoft 365 Copilot if applicable):
 - Formulate a clear prompt that provides context and instructions. Specify the role or style if needed. For example, “*You are a marketing copywriter...*” or “*Act as a financial analyst...*”
 - Run the prompt in ChatGPT and observe the output. If the first attempt isn’t ideal, refine the prompt (this is part of **prompt engineering**). Experiment with adding details or constraints to improve the result.
 - *(If Microsoft 365 Copilot is available, try it for tasks in Office apps – e.g. ask Word Copilot to draft a report from an outline, or Excel Copilot to analyze and summarize a dataset.)*
 - **Example:** For a marketing task of writing a product description, your prompt might be: “*You are a marketing copywriter for a small retail business. Draft a 100-word product description for our new eco-friendly notebook, highlighting its recycled materials and durability, in a friendly, engaging tone.*” Run this in ChatGPT and see the output, then tweak if necessary.
4. **Group Reflection (5 min):** Discuss and note down your conclusions in the reflection

section of the handout:

- What task did you test with AI, and how did the output compare to doing it manually? (e.g. Was it faster? Did it require a lot of edits?)
- Which prompts or approaches worked best to get a good result?
- Identify any limitations or risks observed (e.g. factual errors, tone issues, data privacy concerns).
- Decide on an action point: How might you apply (or not apply) this AI solution in your actual workflow? (For instance, *"We will use ChatGPT to draft weekly newsletters, with a human editor reviewing for accuracy before sending."*)

Sample Tasks and AI Prompt Examples by Function

Below are examples of common tasks (gathered from participants' responses and typical SME scenarios) and how generative AI tools can assist. These illustrate what AI-suitable tasks might look like in different roles:

Marketing

- **Task:** Drafting marketing content – e.g. social media posts, product descriptions, newsletters.
AI Assist: ChatGPT can generate initial drafts of posts or product blurbs based on a brief, saving creative time.
Sample Prompt: *"Write a LinkedIn post (approx 3 sentences) announcing our new product launch – a productivity app for small businesses. Use an excited and professional tone."*
- **Task:** Brainstorming campaign ideas or slogans.
AI Assist: Use ChatGPT for a burst of creative ideas (you can always refine the human-picked ideas later).
Sample Prompt: *"You are a marketing strategist. Give me 5 slogan ideas for a campaign to promote a local coffee shop's new autumn blend. Make them catchy and cozy."*
- **Task:** Translating and localizing ads or product copy for different markets.
AI Assist: Copilot or ChatGPT can help translate text and even suggest culturally appropriate tweaks. Always review for nuance.
Sample Prompt: *"Translate the following English advertisement into Mandarin Chinese, keeping a friendly tone: 'Our storewide sale is now on! Everything is up to 50% off this weekend only.'"*

Finance

- **Task:** Summarizing financial reports or statements for non-finance stakeholders.
AI Assist: ChatGPT can digest a financial report and output a plain-language summary or key bullet points. This helps in preparing executive summaries quickly.
Sample Prompt: *"You are a financial analyst. Summarize the attached profit-and-loss statement for Q3 in 3-4 bullet points, highlighting the most important changes compared to Q2."*
- **Task:** Data analysis preparation – identifying trends or anomalies in spreadsheets.
AI Assist: Microsoft Excel Copilot can quickly analyze data to find trends and even generate charts. ChatGPT can explain data insights in narrative form.
Sample Prompt (for ChatGPT): *"Our sales data shows monthly revenue for two years. Identify any significant trends or seasonal patterns and suggest possible reasons." (Or in Excel Copilot, simply ask: "What are the key trends in this sales data?" and let it generate analysis and visuals.)*
- **Task:** Drafting routine financial communications – e.g. invoice reminders, budget update emails.
AI Assist: ChatGPT can draft professional emails based on a few key points, ensuring consistency and saving time.
Sample Prompt: *"Draft a polite email to a client to remind them of an overdue invoice (Invoice #123, 30 days past due). Mention the amount due (\$5,000) and kindly ask if they need any assistance to complete the payment."*

Operations / Administration

- **Task:** Generating reports from multiple inputs – e.g. weekly status updates, incident logs, or project summaries.
AI Assist: AI can help collate and summarize information from various sources into a coherent report 【16+】. For example, you could paste snippets of different reports and have ChatGPT draft a summary.
Sample Prompt: “Combine the following points into a one-page weekly operations report, in a structured format with headings: [insert key points from various team reports].”
- **Task:** Creating Standard Operating Procedures (SOPs) or checklists.
AI Assist: Provide ChatGPT with an outline of a process, and it can formulate a step-by-step SOP or checklist. This is useful for formalizing processes faster.
Sample Prompt: “Help me write an SOP for onboarding a new employee. Steps should include document submission, account setups, orientation, and first-week training. Provide it as a numbered list with clear instructions.”
- **Task:** Researching and compiling information (market research, vendor comparison, policy updates).
AI Assist: ChatGPT can act as a research assistant, pulling together information from the web (ensure you use the browsing mode or verified sources) and summarizing it. It’s great for initial research drafts.
Sample Prompt: “List the top 3 trends in the retail industry for 2025 and explain how they might impact inventory management for a small business.”
(If using Bing Chat or ChatGPT with browsing, it can find up-to-date info. Always double-check the facts from reliable sources.)

Education / Training

- **Task:** Creating lesson plans or training session outlines.
AI Assist: ChatGPT can generate a structured lesson plan or training outline given the topic and audience. This can jump-start the design of educational content.
Sample Prompt: “You are a training consultant. Outline a 1-hour training session on effective time management for new managers. Include an ice-breaker, 3 main teaching points, and a brief activity.”
- **Task:** Developing quiz questions or knowledge checks.
AI Assist: AI can quickly draft quiz questions at various difficulty levels to complement learning materials. Always review them for accuracy.
Sample Prompt: “Generate 5 multiple-choice questions to test knowledge of our company’s data security policy, with correct answers indicated. Make sure the questions cover key points from the policy.”
- **Task:** Drafting personalized feedback or communications.
AI Assist: For educators or team leads, AI can help draft tailored feedback based on performance metrics or notes (without exposing private data). You input observations, and AI helps turn it into well-phrased feedback.
Sample Prompt: “Compose constructive feedback for an employee who met 80% of their sales targets. Praise their strength in client relationships, and suggest one improvement in time management.”

AI Suitability & ROI Evaluation Checklist

Use the table below to evaluate each task your group brainstormed. This will help determine if AI is a **good fit** and the potential **return on investment**:

Task Description	Repetitive & Routine?	Creative or Strict?	Data Sensitivity (Low/High)	Accuracy Requirement (High/Med/Low)	AI-Suitable? (Y/N)	Estimated ROI (time saved, quality improved)
e.g. Weekly sales report drafting	Yes – every week, follows template	Mostly repetitive analysis	Low (aggregated data)	Medium (needs fact-check)	Y – AI can draft report for review	~2 hours saved/week ; more consistent formatting
e.g. One-on-one client meeting	No – each meeting is unique/personal	Interpersonal, unscripted	High (sensitive info)	High (critical understanding)	N – keep human-driven	N/A (requires human empathy and trust)
Task 1: ...						
Task 2: ...						
Task 3: ...						

Guidelines: Prefer tasks that are **high-volume, routine, and time-consuming** for AI automation. These often yield quick efficiency gains. Tasks that require **personal judgment, creativity with deep context, or involve confidential data** should be approached cautiously or left to humans. In the ROI column, quantify potential benefits (e.g. hours saved per week, faster turnaround, error reduction). This helps in building a business case for using AI.

Reflection and Next Steps

Group Findings: (Use this section to capture your results and plans)

- **Top AI-Suitable Tasks Identified:** List the tasks your group agreed are prime candidates for ChatGPT/Copilot assistance, and why (e.g. *"Drafting the weekly newsletter – saves time and the AI provides good first drafts"*).
- **Tasks to Keep Human-Only:** Note the tasks you felt are not suitable for AI, and why (e.g. *"Handling customer complaints – needs personal empathy and our data is sensitive"*).
- **ROI Estimates:** For the AI-suitable tasks, roughly how much time could be saved or output improved? (e.g. *"Save ~3 hours per week on report writing"* or *"Social media posts engagement could improve with AI-generated variations"*).
- **Responsible Use Plan:** How will you implement AI for the chosen tasks? Include any safeguards (e.g. human review of AI outputs for accuracy, using company-approved tools for data security, etc.). Also identify any training or guidelines you might need to effectively and safely use these AI tools.

Next Steps: Commit to one quick win – after the workshop, try applying AI to one small task and measure the outcome. By tracking results (time saved, quality of output, feedback from team), you can build confidence and justify broader use of AI in your workflow. Remember, the goal is to **reinforce strategic and responsible adoption** of GenAI – using it smartly for efficiency, while maintaining human oversight on critical decisions.