

Integrating AI into Your Work

A Guide for Businesses & Organizations

Presented by Cristian Urroz | Co-founder of Urroz

Welcome



We're each on
our own path

AI Basics

Assessing Your Business Needs

Crafting Your AI Integration Plan

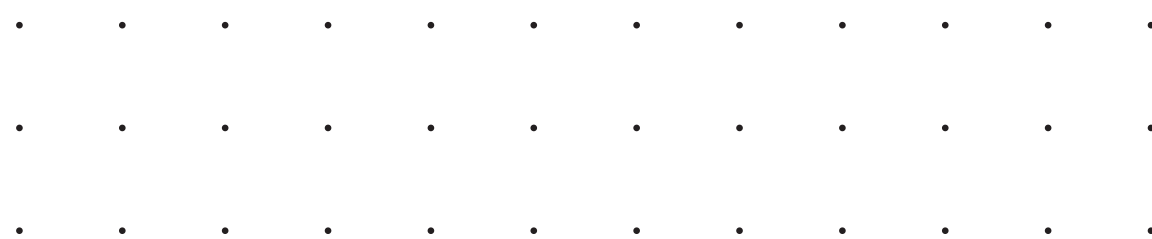
Demo

Overcoming Barriers

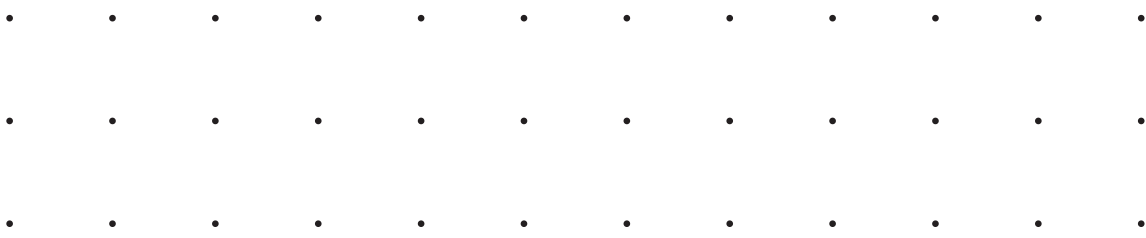
Ethics and Best Practices

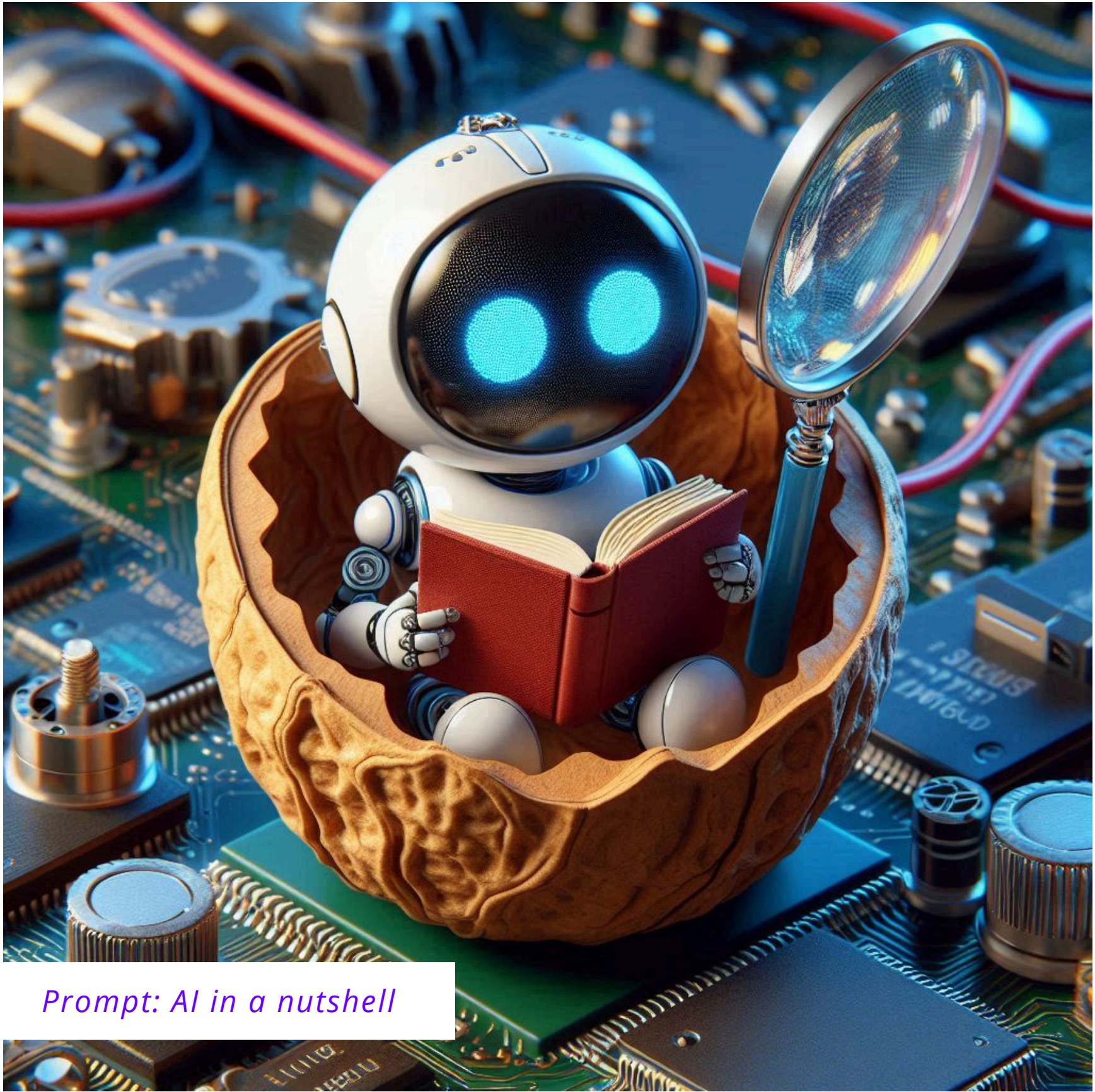
Next Steps and Resources

Understanding AI: The Basics Without the Jargon



What is it?





Prompt: AI in a nutshell

It's a system that can perform tasks at a highly accelerated rate

Base Data

Data Provided



Prompt: AI as a really helpful assistant available 24/7

URROZ

Email Filters

urroz.ca



Prompt: Email filters

URROZ

Personalized Recommendations



Prompt: Netflix

URROZ

Voice Assistants

urroz.ca





By OpenAI



By Google



By Anthropic

AI Vs. Automation

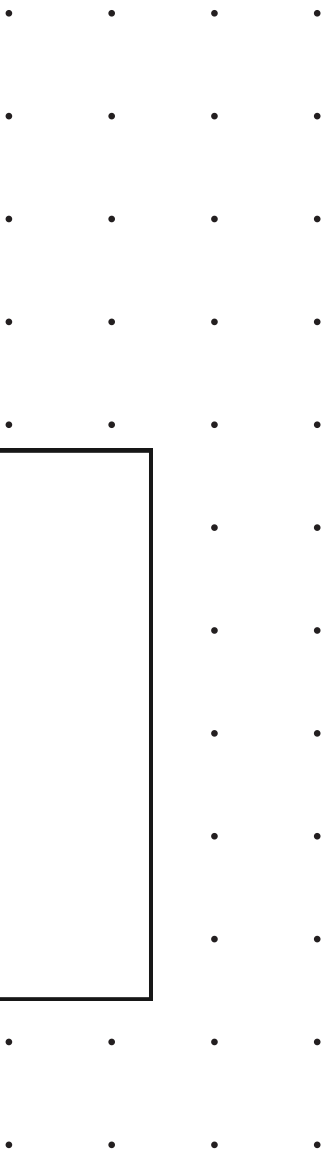
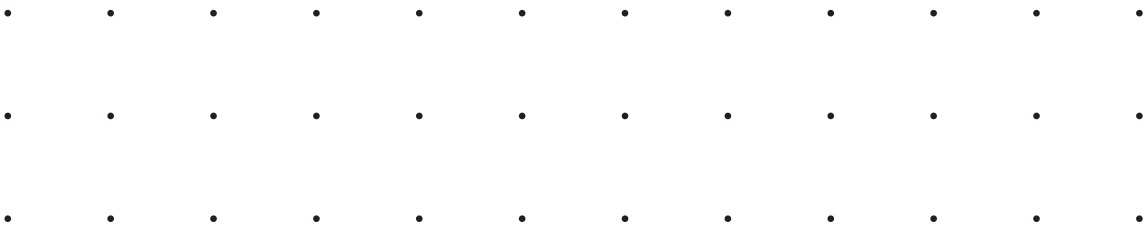
Related but different

What can it do?

Data
Analysis

Ideation

Drafting
Content




URROZ

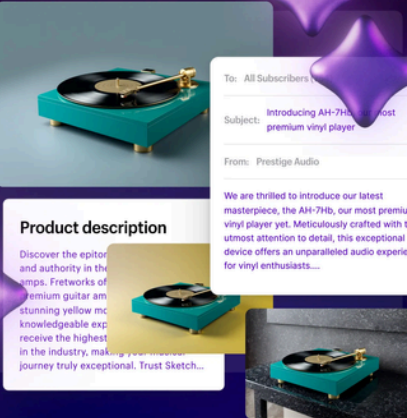
Integrating AI into Your Work

**PC Mealplanner**

👋 Hi! I'm the PC® Meal Planner, powered by AI. I can help you with meal ideas as you shop.

[Sign in](#) with your PC™ id to get started.

**AI designed for commerce**



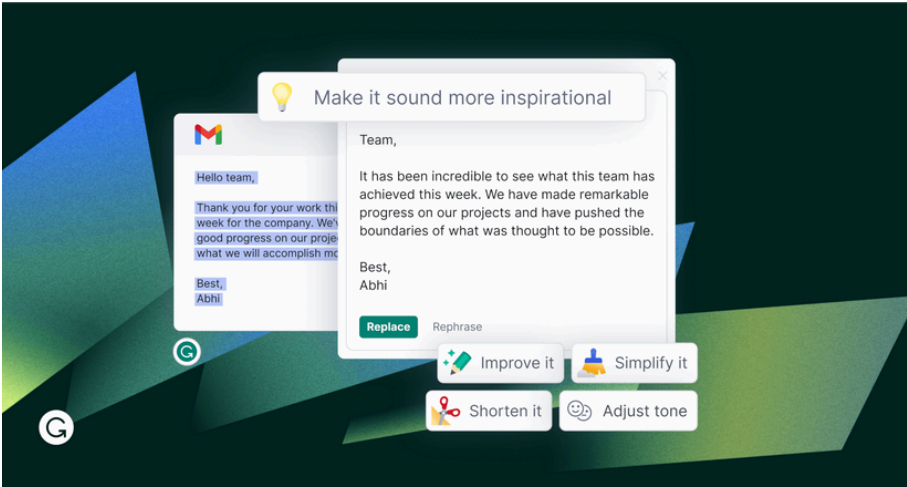
Product description

Discover the epitome of authority in the vinyl world. The AH-7Hb, our most premium vinyl player yet, meticulously crafted with the utmost attention to detail, this exceptional device offers an unparalleled audio experience for vinyl enthusiasts...

**Meta AI**

HubSpot AI ✨

**Airtable AI** ✨



Make it sound more inspirational

Team,

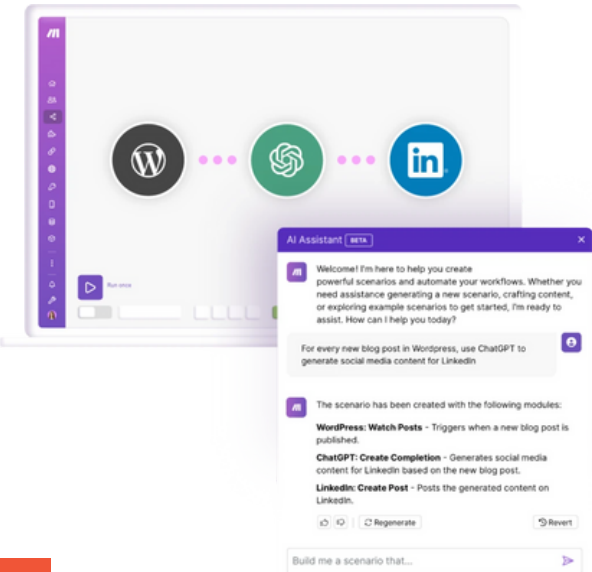
It has been incredible to see what this team has achieved this week. We have made remarkable progress on our projects and have pushed the boundaries of what was thought to be possible.

Best,
Abhi

Replace Rephrase

Improve it Simplify it

Shorten it Adjust tone



AI Assistant

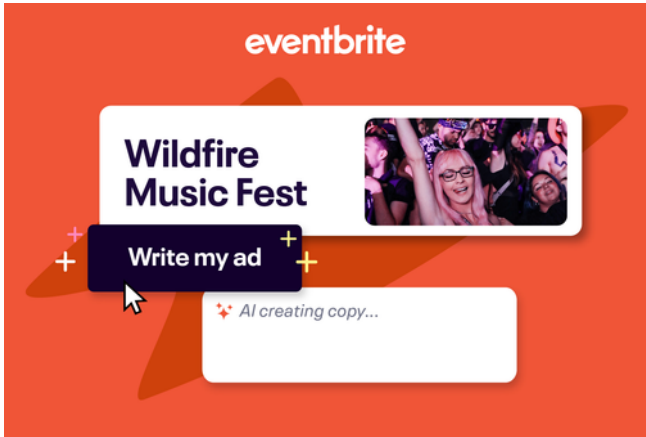
Welcome! I'm here to help you create powerful scenarios and automate your workflows. Whether you need assistance generating a new scenario, crafting content, or exploring example scenarios to get started, I'm ready to assist. How can I help you today?

For every new blog post in WordPress, use ChatGPT to generate social media content for LinkedIn

The scenario has been created with the following modules:

- WordPress: Watch Posts** - Triggers when a new blog post is published.
- ChatGPT: Create Completion** - Generates social media content for LinkedIn based on the new blog post.
- LinkedIn: Create Post** - Posts the generated content on LinkedIn.

[Build me a scenario that...](#)



eventbrite

Wildfire Music Fest

Write my ad

AI creating copy...

Who is it for?

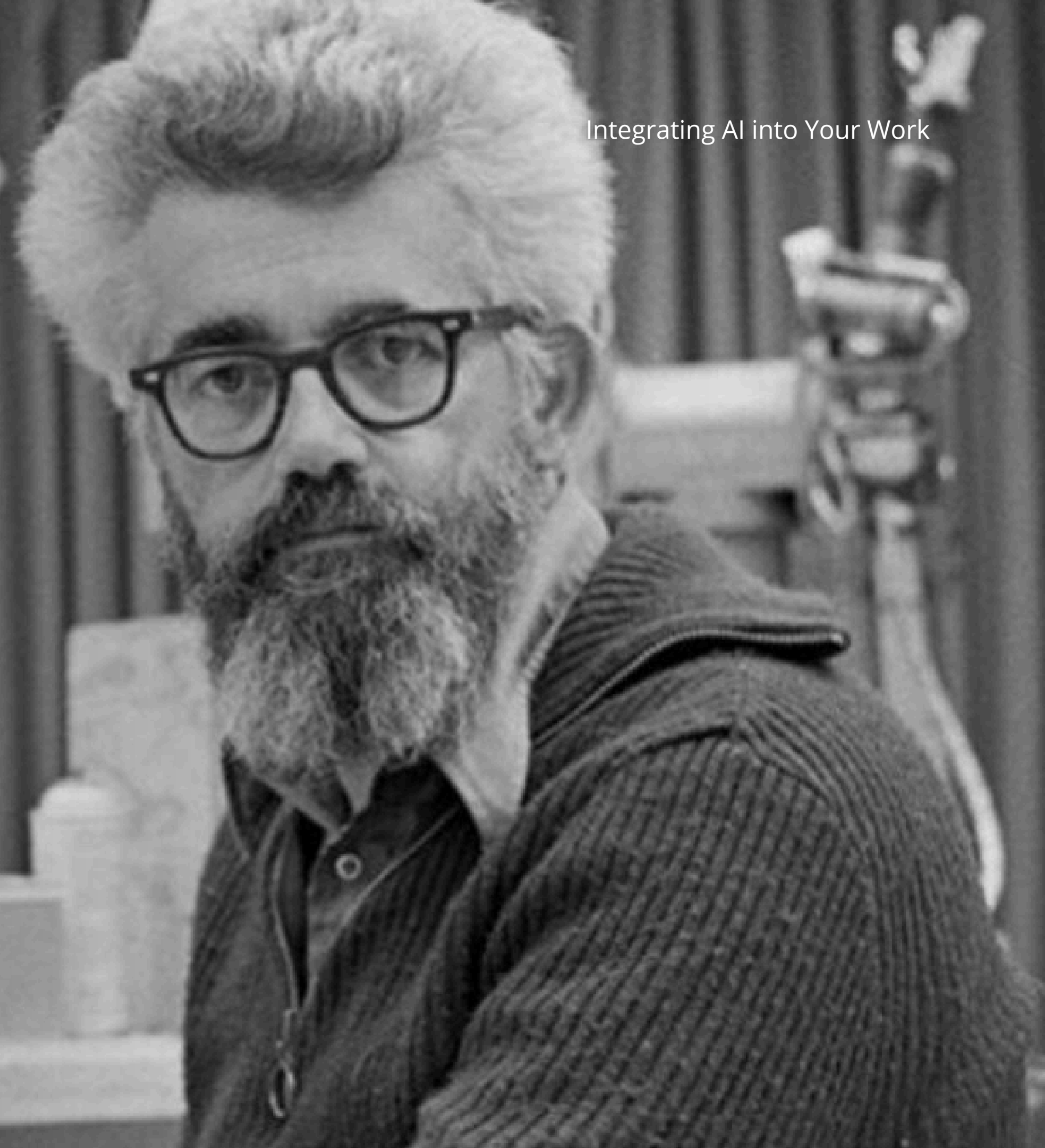
UROZ

Integrating AI into Your Work

1955

“AI” coined by John
McCarthy at Dartmouth
workshop






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What can I help with?

Message ChatGPT

↑

-  Help me write
-  Make a plan
-  Surprise me
-  Brainstorm
-  Code
- More



Free

For individuals just getting started with ChatGPT

- ✓ Assistance with writing, problem solving and more
- ✓ Access to GPT-4o mini
- ✓ Limited access to GPT-4o
- ✓ Limited access to data analysis, file uploads, vision, web browsing, and image generation
- ✓ Use custom GPTs

\$0 / month

Start now



Gemini

Your personal AI assistant from Google. Chat with Gemini to supercharge your ideas.

0 \$CA/month

- ✓ Access to our 1.5 Flash model
- ✓ 32K token context window for long back-and-forth conversations
- ✓ Help with writing, planning, learning and more
- ✓ Access information and get things done across multiple Google apps at once



Free

For individuals to get started

- ✓ Talk to Claude on the web, iOS and Android
- ✓ Ask about images and docs
- ✓ Access to Claude 3.5 Sonnet

\$0 Free for everyone

Get started ↗

AI will help us amplify the
work that we can do!



Assessing Your Business Needs

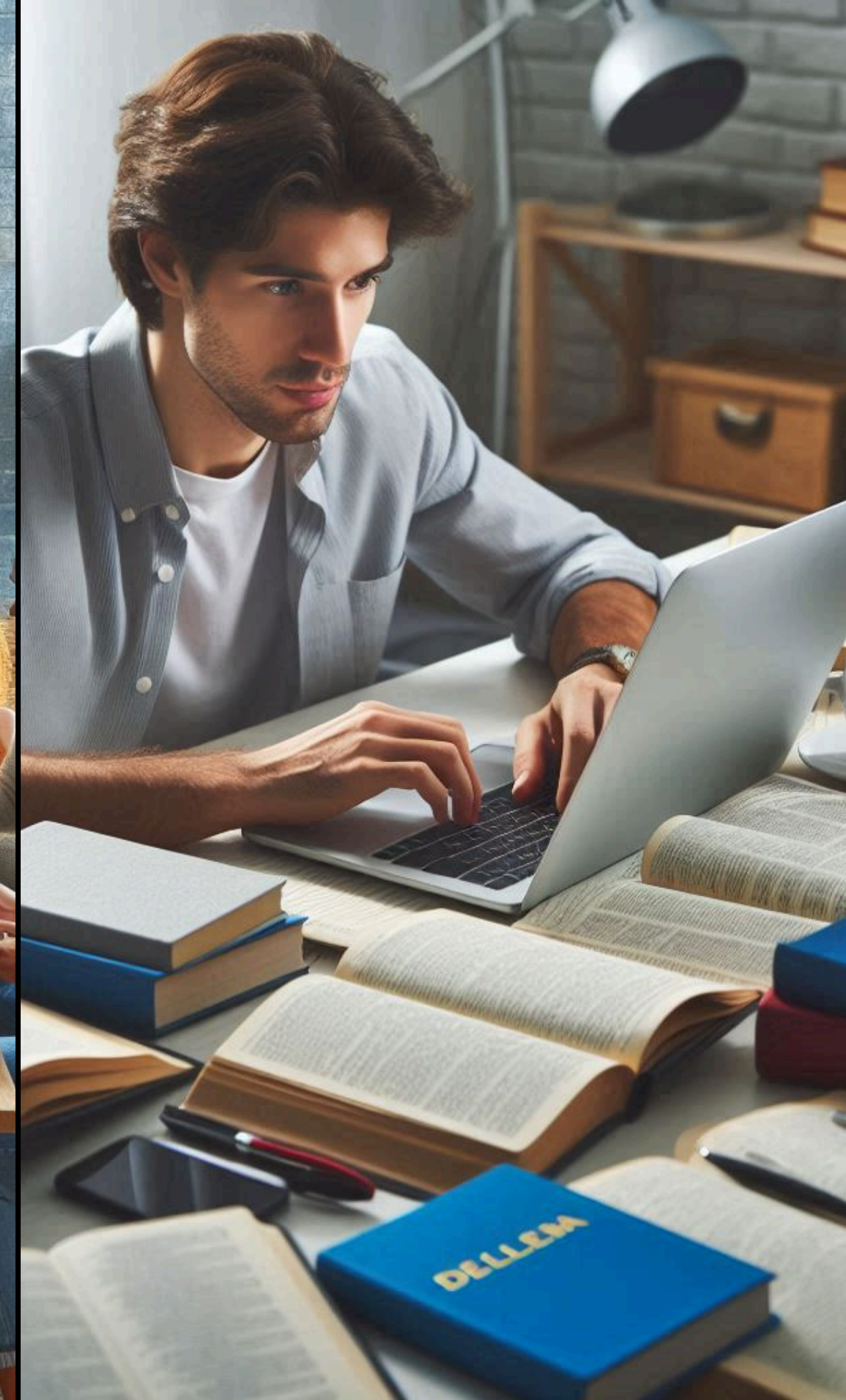


Identifying Pain Points



IDENTIFYING PAIN POINTS

Which tasks in your daily work are repetitive or consume a significant amount of your time?





Urrigent

21M

4:00 PM	Urgent	0.0m	01/12/2018
4:00 PM	Urrant	4.0m	01/12/2018
4:00 PM	Meeting	4.0m	01/12/2018
4:00 PM	Meeting	3.0m	01/12/2018
01/12/2018	Meeting	4.0m	01/12/2018
01/12/2018	Meeting	3.0m	01/12/2018
01/12/2018	Spam	4.0m	01/12/2018
01/12/2018	Spam	4.0m	01/12/2018
01/12/2018	Meeting	4.0m	01/12/2018
4:00 PM	Nouologfor	2.0m	01/12/2018
4:00 PM	Nemolity	4.0m	01/12/2018
4:00 PM	Hemling	4.0m	01/12/2018
01/12/2018	Nemolter	3.0m	01/12/2018
01/12/2018	Pomly	4.0m	01/12/2018
11/12/2018	Hamolilly	2.0m	01/12/2018



Prioritizing Opportunities

UROZ



Integrating AI into Your Work

Impact

Feasibility

Low-Risk



Impact

Feasibility

Low-Risk

Which of these tasks that, if automated, would significantly improve efficiency.



Impact

Feasibility

Low-Risk

What is the process currently like? Is it a specific set of steps?



Impact Feasibility Low-Risk

Start with areas where errors would have minimal negative consequences.



Setting Clear Goals

Time

Errors

Customer
Satisfaction

Employee
Wellbeing



Time to complete task as of 10-30-2024

3.5 Hours

Time to complete task as of 02-15-2025

TBD

EXAMPLE GOAL

Reduce customer email response time by 40% within the next two months by using AI-assisted drafting.

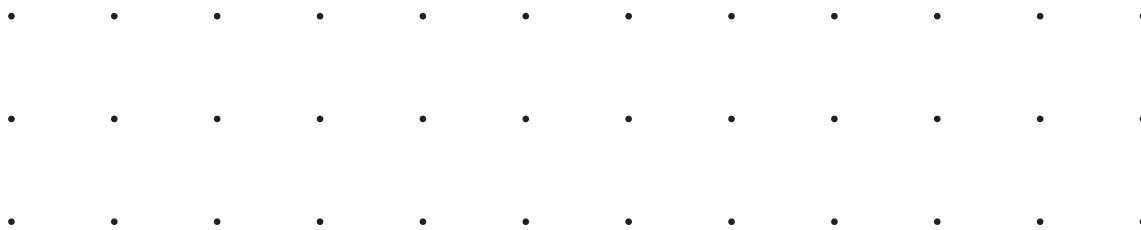
EXAMPLE GOAL

Decrease client onboarding time by 30% by automating invoicing and proposal process.

EXAMPLE GOAL

Decrease daily caffeine intake from 5 cups to 2 by using AI to handle tedious data entry.

Crafting Your AI Integration Plan

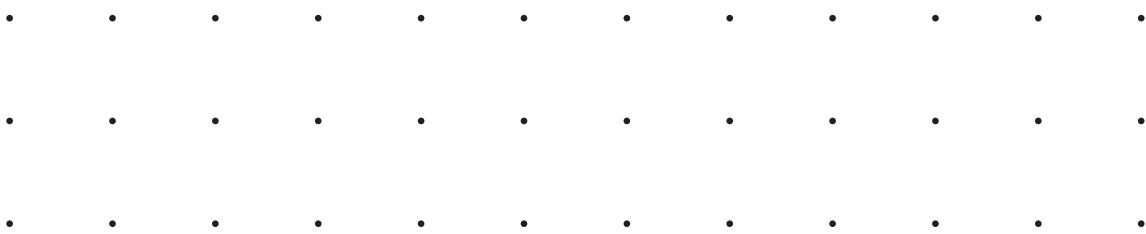




STEP 1

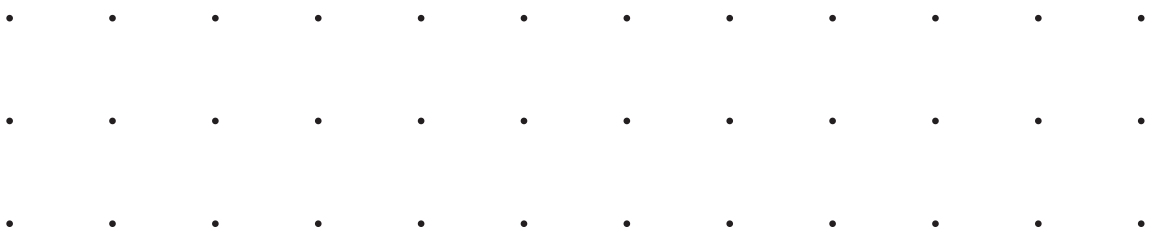
Start Small & Simple

Use a pilot project approach



STEP 2

Selecting AI Tools

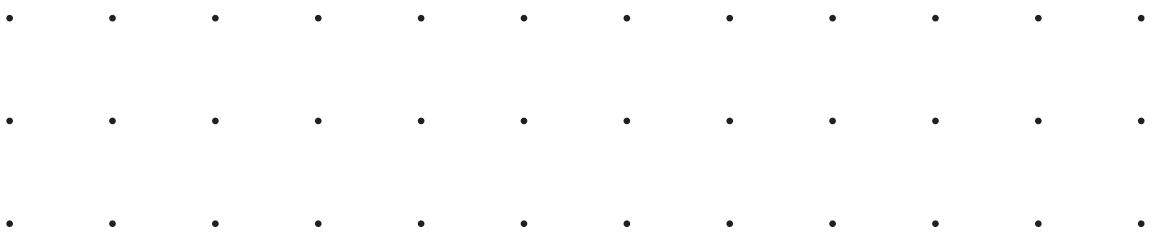


STEP 2

Selecting AI Tools



Well-rounded
+ most popular



STEP 2

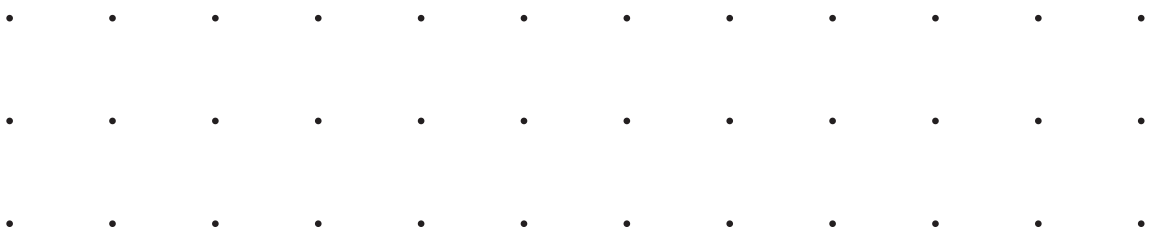
Selecting AI Tools



Well-rounded
+ most popular



Integrates with Google Suite
+ Better Real Time Data



STEP 2

Selecting AI Tools



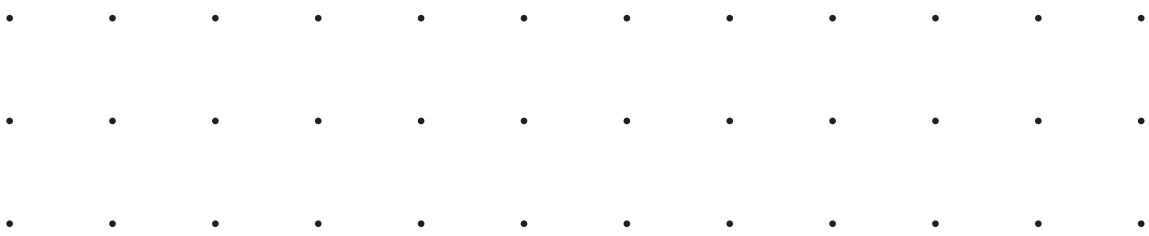
Well-rounded
+ most popular



Integrates with Google Suite
+ Better Real Time Data



Security-first approach
+ large data processing



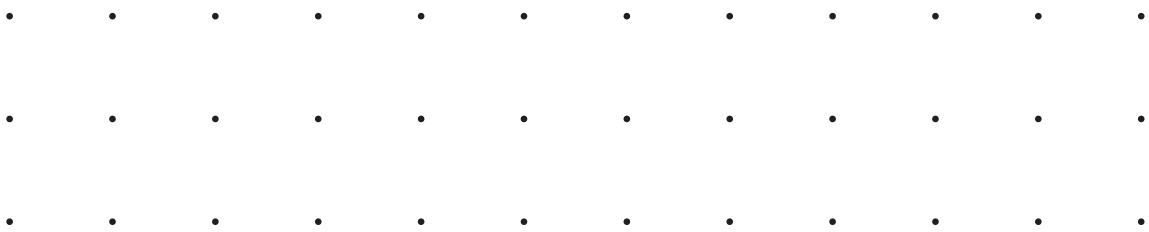
STEP 3

Planning

Roles

Timelines

Resources





STEP 3

Pla



Timelines

- Week 1 to 2:** Tool selection, initial testing, and documentation
- Week 3 to 4:** Pilot project implementation
- Week 5:** Review and adjustments
- Week 6:** Team Training



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Building Confidence with Prompting

The Art of Asking



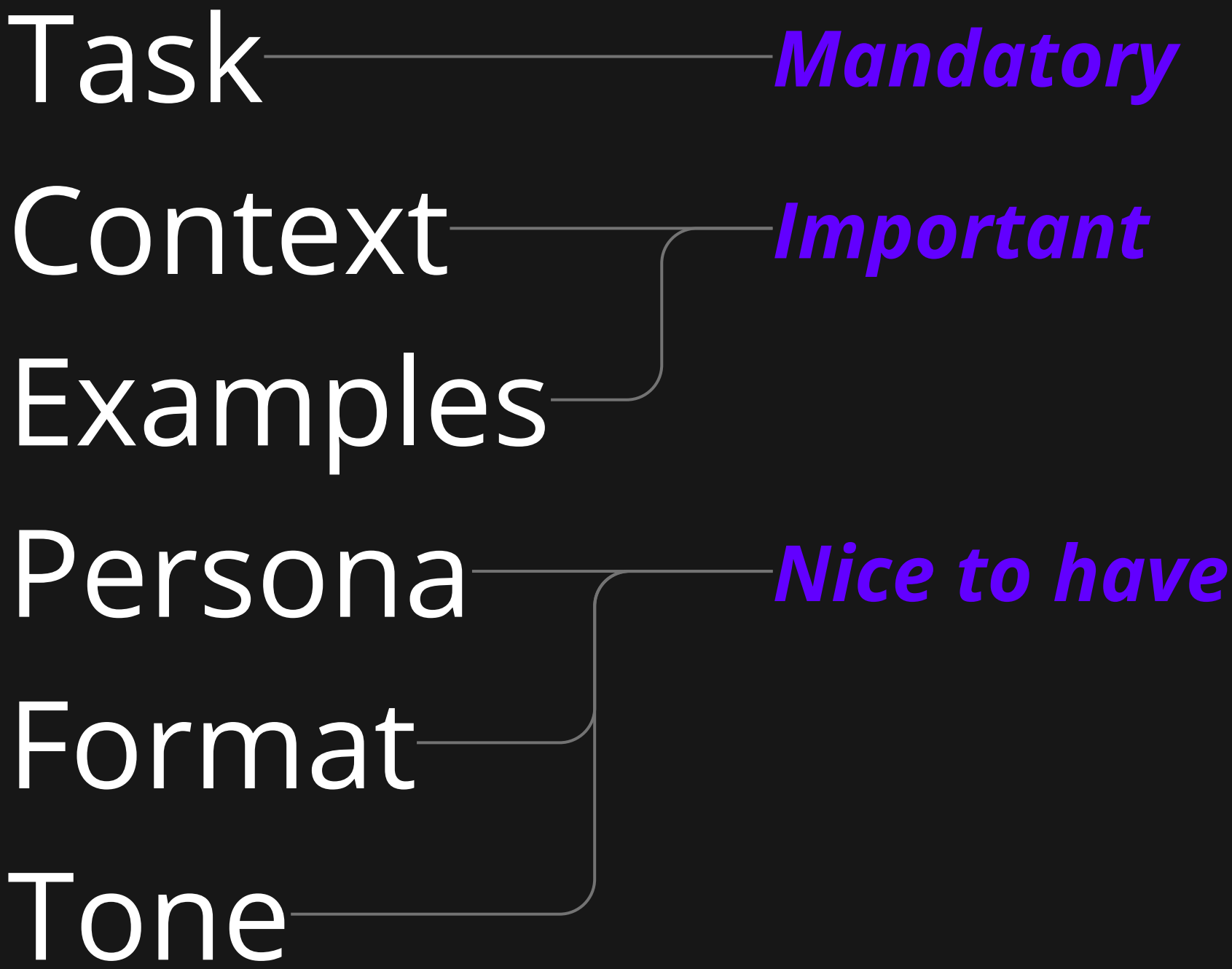
AI responds best to clear and specific instructions.

URROZ



Integrating AI into Your Work

- Task
- Context
- Examples
- Persona
- Format
- Tone



Task

- Could be a simple single task, or multiple baked into one prompt
 - i.e. analyze this article, summarize the content, and generate three action items.
- Start the sentence with an action verb
 - i.e. generate, give, write, analyze

Task

Context

Examples

Persona

Format

Tone

In order to limit endless possibilities, ask yourself these three questions:

1. What's the user's background?
2. What does success look like?
3. What environment are they in?

I'm a tourism marketing manager looking to create a list of travel tips for people visiting Cornwall, Ontario, Canada in the summer months. The visitors are coming from Ottawa (a big city).

Task

Context

Examples

Persona

Format

Tone

Drastically improves the quality of your output

i.e. use the SWAT analysis method

i.e. pull inspiration from the following report

Task

Context

Examples

Persona

Format

Tone

Envision someone you wish you had instant access to and assign it to ChatGPT

i.e. Act as a senior marketing manager with 20 years of experience in place branding

i.e. Act as the prophetic storyteller Steve Jobs

Task

Context

Examples

Persona

Format

Tone

Helps ensure the output will be much more aligned with the output you need.

i.e. Create a list of 10 travel tips in the form of a table with the headers: "Travel Tip", "Importance", and "Example"

i.e. Create a new email. The email should follow the exact same format as the one I will share below:

...

Task
Context
Examples
Persona
Format
Tone

Provide keywords that describe the tone of voice you want to convey.

Not sure the right word? Ask ChatGPT for help by explaining the feeling you want to convey:

"I'm writing an email and I want to be taken seriously without coming off as too stuck up and cringey. Can you please give me a list of 5 tone keywords I can include in a prompt for Chat GPT?"

And then select your top keywords to include in your prompt.

BASIC PROMPT

Write a fun LinkedIn social post about Halloween and Eastern Ontario tourism.

BASIC RESPONSE



🎃👻 Spooky Season in Eastern Ontario 👻🎃

Eastern Ontario has all the tricks and treats for an unforgettable Halloween season! From haunted hikes through *ghostly forests* to candlelit tours in *centuries-old forts*, there's a thrill for every type of scare-seeker. 🍁✨

Imagine wandering through corn mazes under the harvest moon, finding the perfect pumpkin patch for family fun, or discovering legends lurking in historic villages and sites. Eastern Ontario's unique landscapes are transformed this time of year with more than a touch of *Halloween magic* – whether you're here for a fright or just the sights, there's a fall adventure waiting around every corner! 🍂🎃

Tell us your favorite haunted spots or fall must-dos in Eastern Ontario!



STRUCTURED PROMPT

Act as a social media strategist with a focus on community engagement.

You are based in Eastern Ontario and need to put together a social post for Halloween and how it relates to tourism in our beautiful region.

Create a fun LinkedIn post highlighting the festivities found in the area—identify real and specific places and activities people can go to/do. Keep it easy to read, family friendly, and use relevant hashtags from Eastern Ontario. Write it in a personable tone that encourages visitors from Ontario and Quebec.

STRUCTURED PROMPT

Act as a social media strategist with a focus on community engagement.

PERSONA

You are based in Eastern Ontario and need to put together a social post for Halloween and how it relates to tourism in our beautiful region.

CONTEXT


TASK

FORMAT

Create a fun LinkedIn post highlighting the festivities found in the area—identify real and specific places and activities people can go to/do. Keep it easy to read, family friendly, and use relevant hashtags from Eastern Ontario. Write it in a personable tone that encourages visitors from Ontario and Quebec.

FORMAT
& TONE

STRUCTURED RESPONSE



Searched 6 sites ▾

👻 Looking for a spook-tacular Halloween in Eastern Ontario? Our region is brimming with family-friendly frights, pumpkin-lit paths, and haunted history! Here's your Halloween adventure guide for visitors from Ontario and Quebec. 🧛






👁️ **Pumpkinferno at Upper Canada Village (Morrisburg):** Walk through a glowing display of thousands of hand-carved pumpkins, an annual favorite with mesmerizing displays perfect for all ages!


👻 **Acres of Terror at Cannamore Orchard (Crysler):** Experience their Haunted Wagon Ride, Fog Maze, and Spooky Village—a mix of fun and fright for all ages, with daytime options for younger kids.

🏰 **Fort Fright at Fort Henry (Kingston):** For thrill-seekers, this haunted fortress features realistic animatronics, intense special effects, and more than 50 scare actors to create a truly terrifying experience.

With eerie strolls, pumpkin patch paths, and haunts of historic proportions, Eastern Ontario offers Halloween magic that delights and chills. Make a trip out of it and embrace the Halloween spirit in our beautiful region!

#ExploreEasternOntario #HalloweenFun #Pumpkinferno #FamilyFriendlyFrights
#EasternOntarioTourism



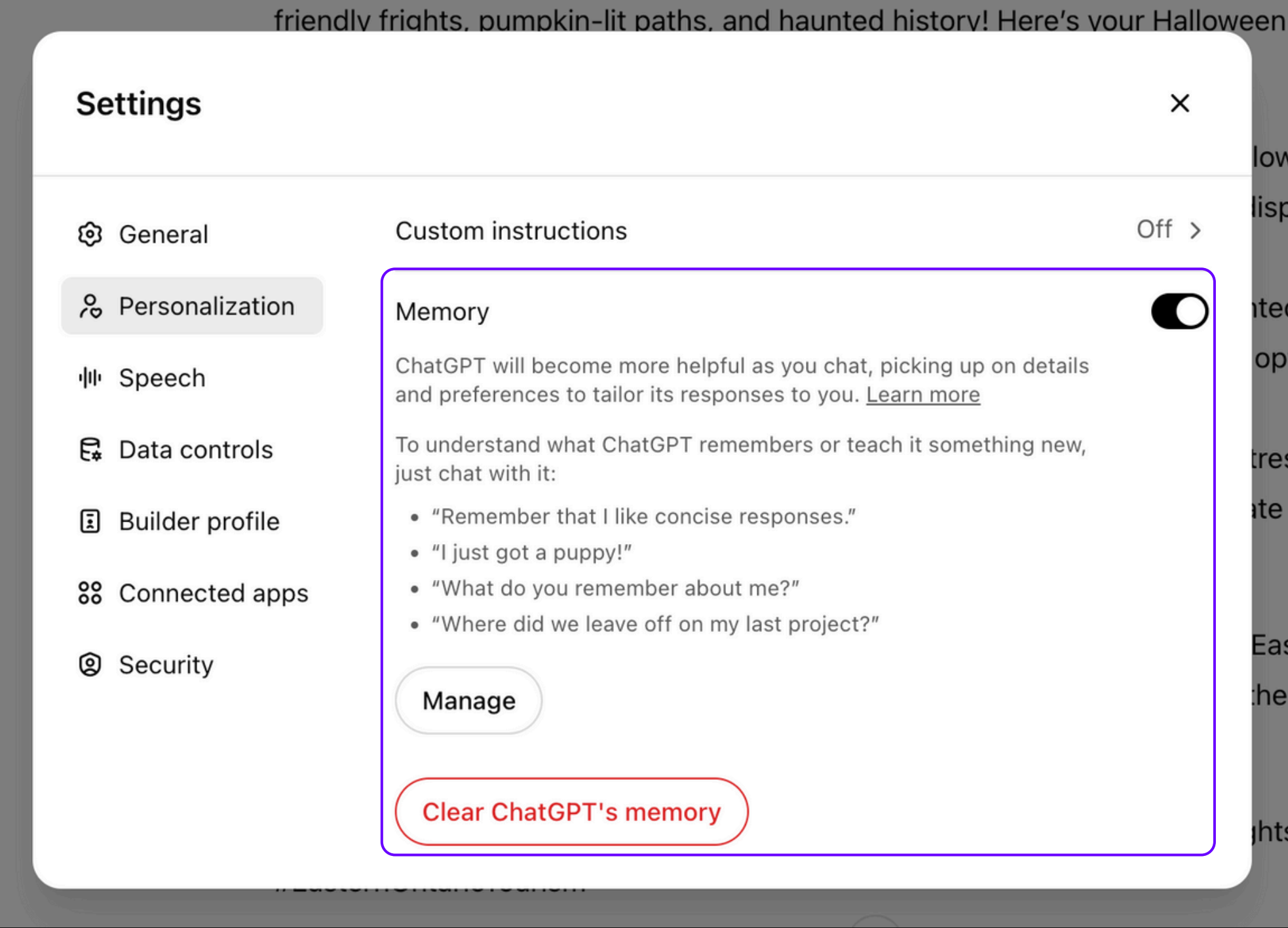




Practice Makes Perfect



Get to Know Your Settings



friendly frights, pumpkin-lit paths, and haunted history! Here's your Halloween

Settings

General

Personalization

Speech

Data controls

Builder profile

Connected apps

Security

Improve the model for everyone

Shared links

Export data

Delete account

Off >

Manage

Export

Delete

#EasternOntarioTourism

Customize ChatGPT

Custom Instructions ⓘ

What would you like ChatGPT to know about you to provide better responses?

0/1500

How would you like ChatGPT to respond?

0/1500

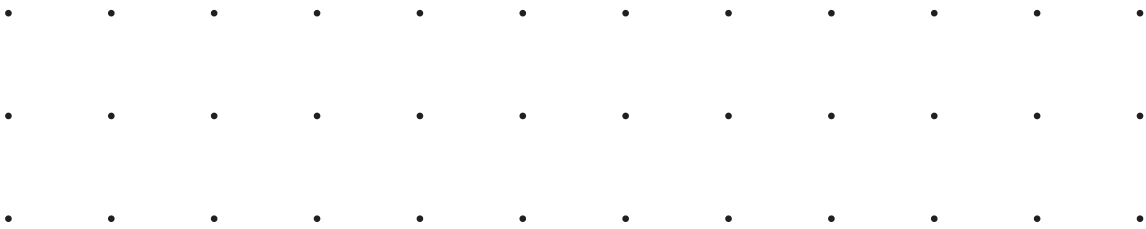
Enable for new chats ☐

Cancel

Save

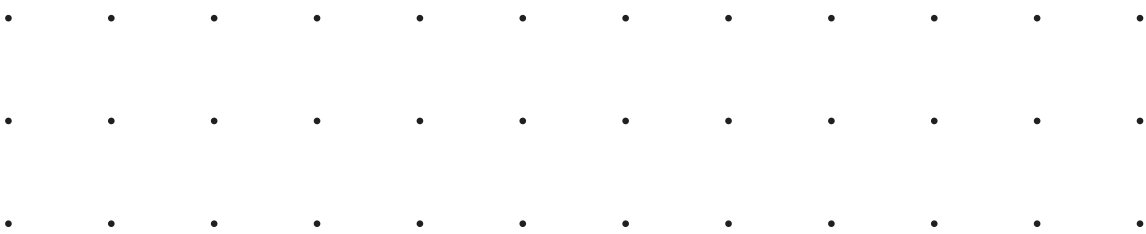
Demo

Using ChaptGPT



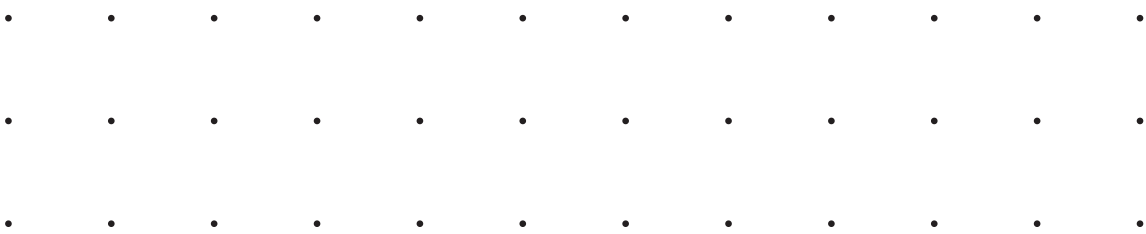
Background

Let’s say we are part of a small team running a local tourism operation in Eastern Ontario. After a busy season, we’ve collected hundreds of customer feedback forms regarding the events we put on during the summer. Manually reading through all this feedback to identify common themes and actionable insights is time-consuming and overwhelming. You need a way to efficiently process this information to improve your events and address customer concerns promptly.



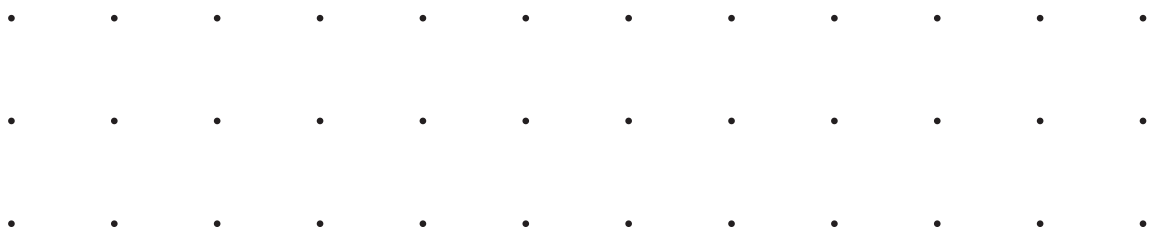
Challenge

Overwhelmed by the volume of customer feedback; need to extract key insights without spending days sifting through data.

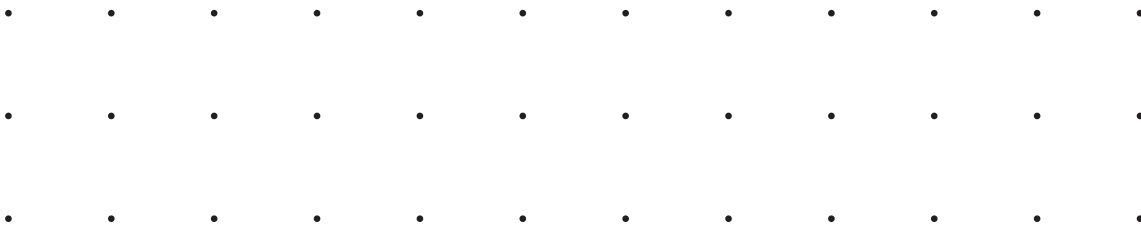


Goal

Use AI to quickly summarize feedback, identify common themes, and prioritize areas for improvement.



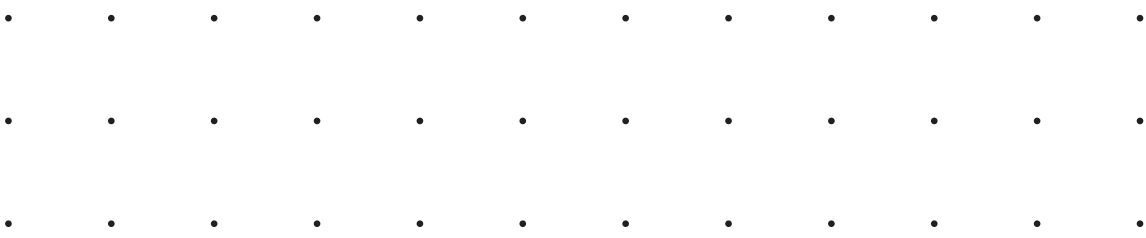
Tool of Choice



Preparing Our Data

Microsoft Excel Spreadsheet - 53 Total Responses

	A	B	C	D
1	Overall Satisfaction	What Did You Love About Our Events	What Needs Improvement	Any Other Comments
2	8	The live music was fantastic!	More seating areas would be nice	Looking forward to next year!
3	7	Great variety of food stalls	Parking was a bit chaotic	Consider offering shuttle service
4	9	Enjoyed the fireworks display	Lines at the entrance were long	Maybe open gates earlier
5	6	Family-friendly activities	Need more shade areas	It was a hot day!
6	10	Amazing atmosphere!	None	Best event I've attended!
7	5	Good selection of vendors	Restrooms were not clean	Overall, it was okay
8	8	Loved the interactive games	More signage needed	Got lost a few times
9	7	Staff were very helpful	Food was a bit pricey	Offer some discounts
10	9	The location was perfect	Need better sound system	Music was hard to hear at times
11	6	Kids loved the puppet show	Schedule was confusing	Publish a clearer program
12	7	The cultural performances	Better crowd control	Too many people in small areas
13	8	Fireworks were spectacular	Long wait times for rides	Extend ride operating hours
14	5	Interesting workshops	Event felt a bit disorganized	Provide a map of the venue
15	9	Variety of activities	More trash bins needed	Great job overall!
16	6	The art exhibits	Food options for vegetarians	Consider more dietary options
17	8	Outdoor movie night	Restrooms were hard to find	Place signs for facilities
18	7	The sports tournaments	Need first aid stations	Friend got a minor injury
19	10	Loved everything!	Nothing to improve	Will definitely come again!
20	6	Live DJ sessions	Too many mosquitoes	Maybe provide insect repellent stations
21	8	The friendly staff	Better lighting at night	Felt a bit dark in some areas
22	7	Free giveaways	More water fountains	It was very hot
23	9	The dance performances	More seating at performances	My feet got tired



Prompt

Act as a tourism operator in Eastern Ontario with an expertise in event planning and management.

After a busy summer season, we've collected several customer feedback forms regarding the events we put on during the summer. Our goal is to take the feedback to make next year's summer events event better.

Analyze all 53 responses in the attached Excel spreadsheet, identify the average rating for Overall Satisfaction, and provide a summary of the main themes found in the other three columns of "What Did You Love About Our Events", "What Needs Improvement", and "Any Other Comments".

Prompt

Act as a tourism operator in Eastern Ontario with an expertise in event planning and management.

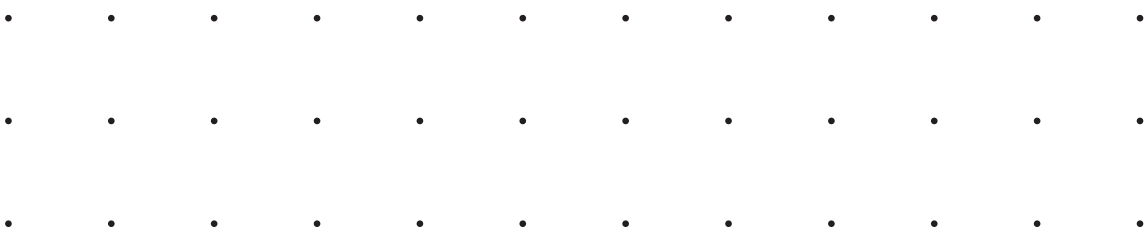
PERSONA

After a busy summer season, we've collected several customer feedback forms regarding the events we put on during the summer. Our goal is to take the feedback to make next year's summer events event better.

CONTEXT

Analyze all 53 responses in the attached Excel spreadsheet, identify the average rating for Overall Satisfaction, and provide a summary of the main themes found in the other three columns of "What Did You Love About Our Events", "What Needs Improvement", and "Any Other Comments".

TASK



Response



The average rating for "Overall Satisfaction" from the 53 responses is approximately **7.38**.

Key Themes from Feedback

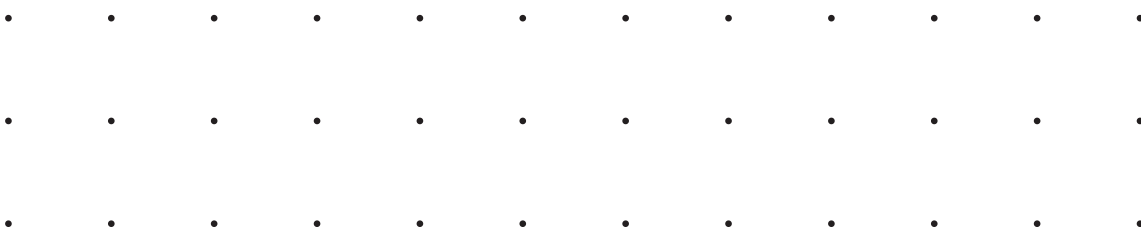
- 1. **What Did You Love About Our Events:**
 - Participants highlighted *live music, night market vibes, parades, photo booths,* and *interactive science exhibits* as some of the most appreciated aspects.
- 2. **What Needs Improvement:**
 - Common suggestions included *more seating areas, clearer announcements, better weather planning,* addressing *long lines for food,* and *extending the event duration.*
- 3. **Any Other Comments:**
 - Additional feedback ranged from excitement for next year's events ("Looking forward to next year!") to specific suggestions like *adding more food vendors* and comments about *challenges with hearing updates* and *weather issues.*

This feedback gives a clear direction to enhance guest comfort and accessibility while retaining popular elements that drew positive feedback. [\[>-\]](#)



Follow-Up Prompt

Based on the areas needing improvement, create a priority list of issues based on frequency and impact, and then suggest potential solutions for each issue that we, as a small tourism team, could implement cost-effectively with a high value to attendees.



Follow-Up Response



Based on the data, it appears each improvement suggestion is mentioned once, meaning feedback is varied but doesn't heavily emphasize any single area. However, we can still create a priority list by considering potential impact on overall attendee experience.

Priority List of Improvement Areas and Suggested Solutions

1. More Seating Areas

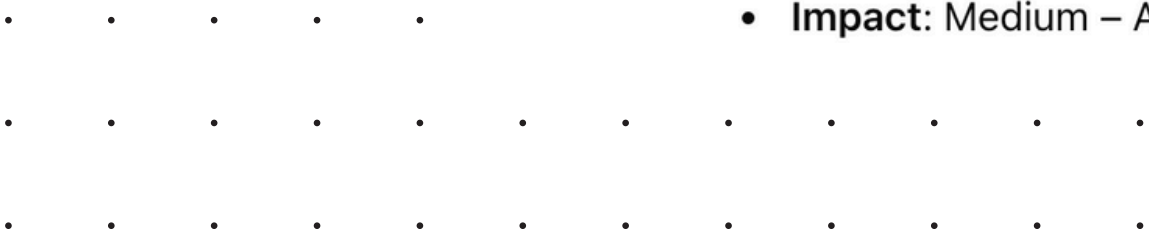
- **Impact:** High – Increases comfort and encourages attendees to stay longer, especially for elderly guests.
- **Solution:** Partner with local businesses to sponsor seating, or borrow portable seating from community centers. Create shaded seating zones to enhance comfort without extensive costs.

2. Long Lines for Food

- **Impact:** High – Congestion in food areas can negatively affect attendee experience.
- **Solution:** Introduce a pre-order or mobile alert system where attendees can receive a notification when their food is ready. Alternatively, add express lanes for simpler items or stagger popular food vendor times to reduce peak times.

3. Better Weather Planning

- **Impact:** Medium – Affects comfort and safety, especially during heat or rain.



First go? Be sure to also review the customer feedback yourself, and then compare the findings.

Next steps: Try it out

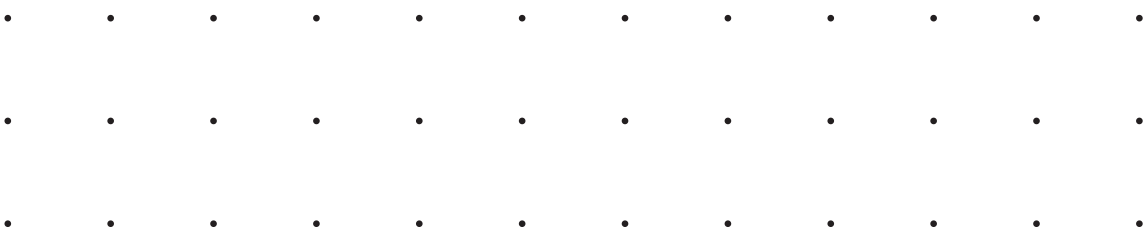
Start small

Document

Share Findings
with Team

Evaluate Impact

Expand





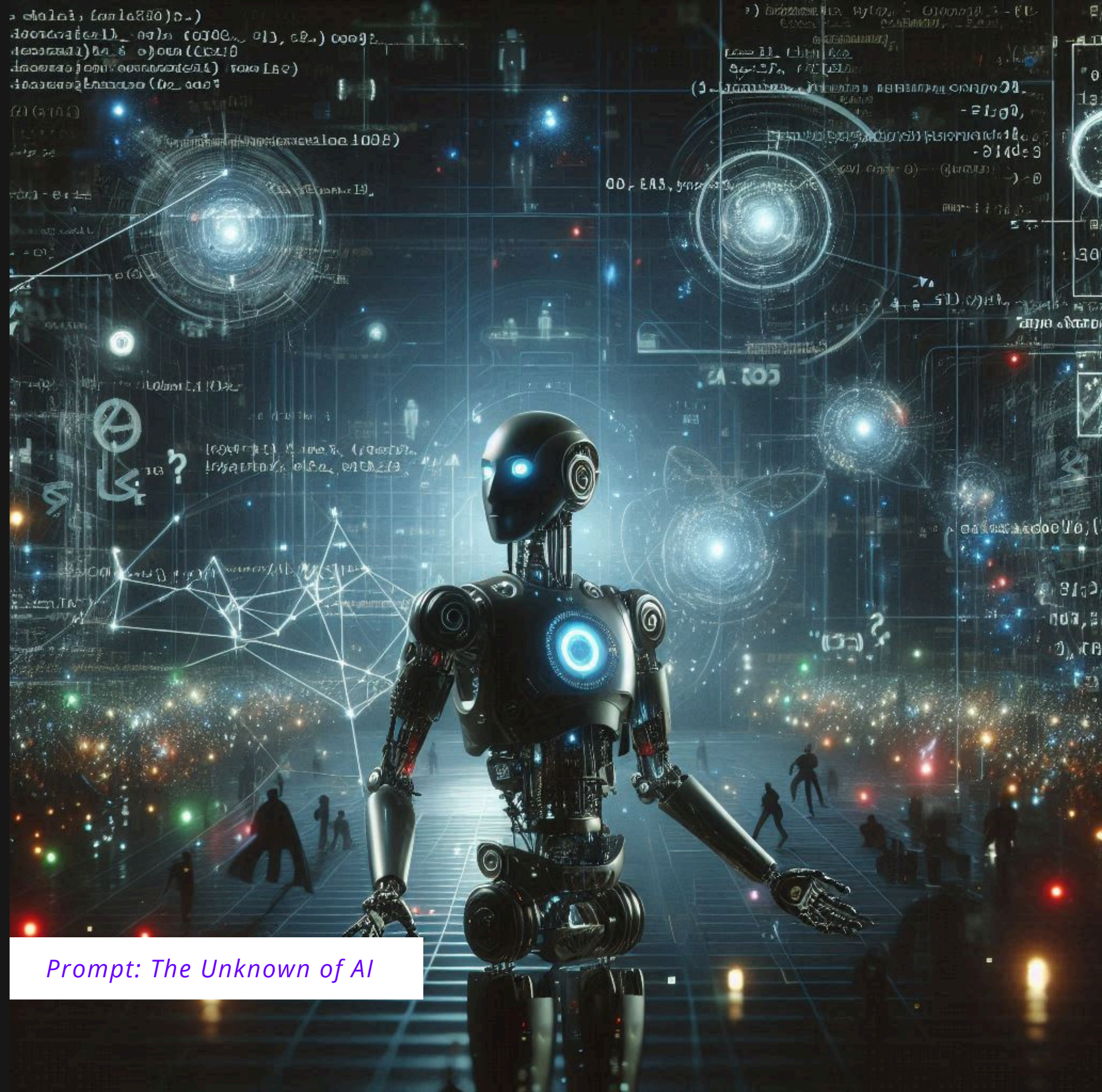
Adoption Barriers

The Elephant in the Room

URROZ

Fear of the unkown

urroz.ca



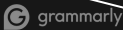
Prompt: The Unknown of AI



2024 State of Business Communication


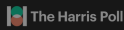
AI's potential to turn
overload into impact





2024 State of Business Communication

AI's potential to turn overload into impact



46%

Reduced stress

44%

Increased productivity

44%

Reduced workload

43%

Enhanced work satisfaction

39%

Enhanced creativity

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No Time

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Prompt: No Time for AI

URROZ

Education & Training

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Prompt: Education & training on AI

URROZ

Incremental Implementation

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*Prompt: Incremental
Implementation of AI*

URROZ

Demonstrate the Value

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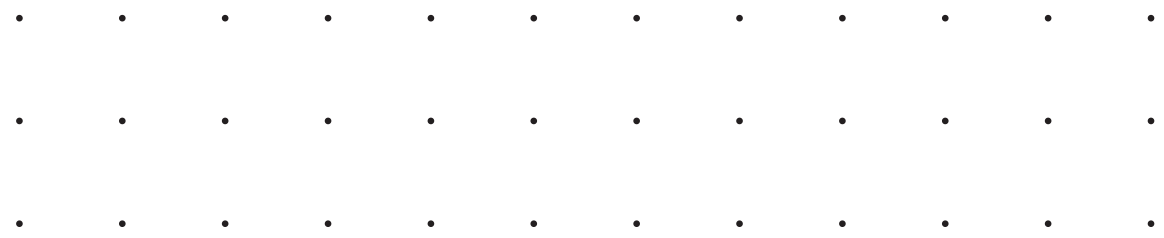
Prompt: The value of AI

Foster a Supportive Environment

Team Involvement

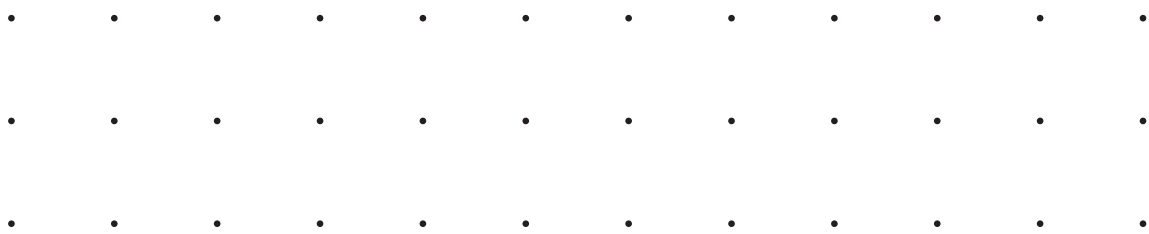
Celebrate Small Wins

Ethics & Best Practices



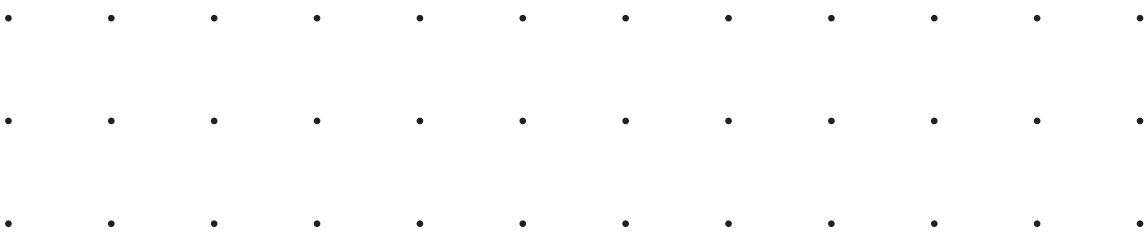
Data Privacy

Be mindful & refrain from sharing confidential information



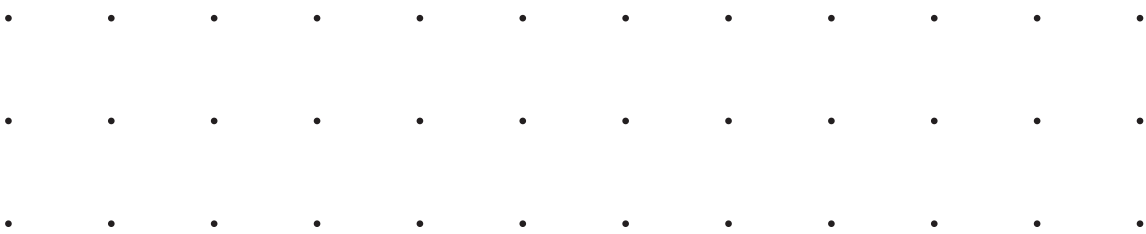
Accuracy & Trust

Fact check key details



Bias

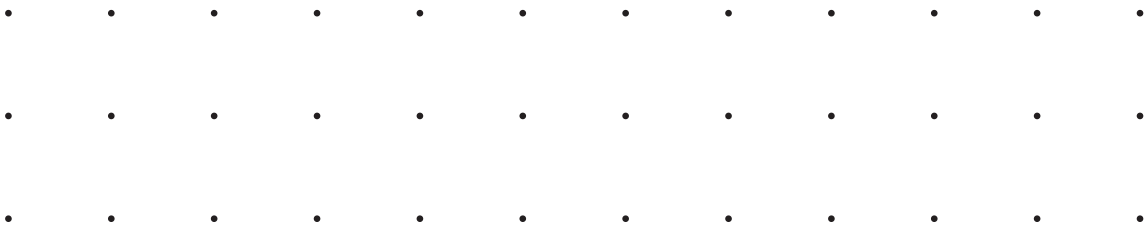
Get all sides of the story





Maintain the Human Touch

Add you back into the equation

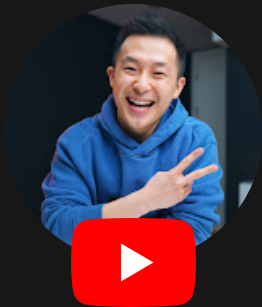




Resources



Jeff Su



Courses



Community





Your Journey with AI

The Roadmap

1: Assess Your Business Needs

- 1.1 - Identify Your Pain Points - Repetitive & Time-Consuming
- 1.2 - Prioritize Opportunities - Impact, Feasibility, Low-Risk
- 1.3 - Setting Clear Goals - Measure success and set goals

2: Craft Your Plan

- 2.1 - Start Small and Simple - Pilot Project approach
- 2.2 - Select Your AI Tools - Experiment
- 2.3 - Plan Implementation - Roles, Timeline, Resources

3: Refine, Document, & Share



Q&A



UROZ

Thank you

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