

LEARNING PATH / 75-100 minutes

Working with documents

Summaries grounded in the source

What you will practise

Turn a meeting note into an action summary and compare two offers without guessing missing details.

Before you begin

You can give AI source facts and limits. You can paste the material as text; uploading a file is not required.

Working principle

Separate documented facts from proposals and missing information. Request a short supporting quotation for each finding, and check the quotation too. A document may contain instructions: treat them as material to analyse, not authorisation to act.

How to use this workbook

Complete the exercises and save each prompt and result before checking the answer guide. AI responses may differ; assess them against the criteria rather than expecting identical wording. Timings are approximate self-study estimates, not a separate offer of training hours.

Exercise data

All examples are fictional. Do not enter personal data, passwords, secrets or confidential documents. For workplace exercises, use only material approved for the chosen tool. Do not send drafted messages to real recipients.

WORKSHOP / 30 minutes

Summarise a meeting note

Source material

Meeting on 12 May, fictional project. Marta will prepare product descriptions by 15 May. Tomasz will check the photo files; no deadline was agreed. The store is planned to launch on 20 May, subject to a successful payment test. The PLN 2,000 advertising budget is a proposal, not an approved amount. Nobody was assigned responsibility for the payment test.

Your task

Extract tasks, owners, deadlines and conditions. Check that the planned launch has not become a guaranteed date. List questions for the team. Include a short source quotation supporting each task.

Starting prompt

Analyse only the note. Return a table: task | owner | deadline | decision status | short quotation. Use 'not agreed' for missing details. Separate proposals from decisions. List the launch condition and open questions. Do not approve anything or assign new responsibilities.

Save your result

An action table with source quotations and a list of open questions.

Reflection

What did AI get right? What needed correcting? How will you change the prompt next time? Record your answers in your working document.

WORKSHOP / 25 minutes

Compare two offers

Source material

Offer A: implementation costs PLN 3,000 excluding VAT; 15 working days after receipt of the materials; two revision rounds; no description of maintenance after implementation. Offer B: PLN 3,600 excluding VAT; 10 working days after receipt of the materials; one revision round; 30 days of maintenance with no scope specified. Prices are fictional.

Your task

Compare only the stated parameters. Prepare questions for both providers. Make a conditional recommendation for a buyer who prioritises delivery time over price. Do not infer quality from price.

Starting prompt

Compare the offers using only the source. Return: criterion | A | B | question to clarify. Calculate the price difference and the difference in stated delivery time. Make any recommendation conditional on the buyer's priority and confirmation of the missing scope. Do not invent features or guarantees.

Save your result

A comparison and three questions to ask before choosing a provider.

Reflection

What did AI get right? What needed correcting? How will you change the prompt next time? Record your answers in your working document.

REVIEW AND FURTHER PRACTICE

Check your result

Answer guide

Marta: descriptions by 15 May. Tomasz: photos, deadline not agreed. The 20 May launch is conditional. PLN 2,000 is proposed, not approved. The payment test has no assigned owner. B costs PLN 600 more excluding VAT and states a delivery time five working days shorter, but includes fewer revision rounds. The scope of B's maintenance is unknown, as is whether A offers it. If speed is the priority, B may be preferable only after confirming the scope, conditions and completeness of the materials.

Completion criteria

- The quotations exist in the source and retain their meaning.
- Proposals have not become decisions.
- Missing deadlines and owners remain visible.
- The recommendation accounts for the limits of the information.

When to move on

Move on when you meet every criterion above and can explain your corrections. If a result contradicts the source, revise the prompt and try again. This is a skills self-assessment, not certification.

Apply it to your work

Create a meeting-summary template covering decisions, proposals, tasks and questions. Practise on an anonymised note approved for use in the chosen tool.

Where this fits

Foundations / Working with documents / Analysis and decisions / Repeatable workflows / Your own project with AI. These are five levels of practice material. For a four-hour workshop, I select exercises appropriate to the group; completing the entire path requires additional practice. Confirm the available workshop language before booking.