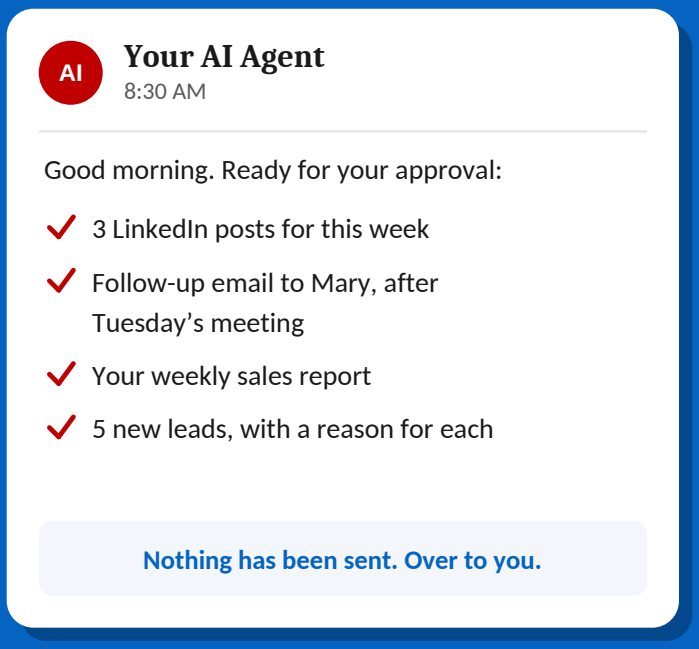
MONDAY, 8:30 AM

Your week's work, drafted before you've had coffee.

Meet the newest member of your team: an AI agent that knows your job, your facts and your voice, and never acts without your approval.



Works with the AI tool your organisation already owns: Microsoft 365 Copilot agents, Claude Projects or ChatGPT Projects.

WorkingSm@rt®
with your AI Agent

Who Should Attend

- Professionals who already have an AI tool but mostly use it for one-off prompts.
- Executive assistants, marketing, sales, HR, L&D, PMO and operations staff with repeatable weekly work.
- Team leads who want a consistent, safe way for their team to use AI.

Format

- 2 x half-day, instructor-led online sessions, three weeks apart
- Build time between sessions, using your own work
- One-on-one personal coaching session with a skilled facilitator, 3 to 4 weeks after Session 2

What's Included

- Comprehensive Learning Guide
- AI Agent Starter Kit: templates for the job description, fact register, voice guide and approval rules
- Client for Life: return to a public workshop you attended at no cost, where available
- LearningLink: our monthly productivity e-newsletter

From using AI to working with it: build an AI agent that knows your job.

Most people use AI like a search box: one question, one answer, start again tomorrow. The real productivity gain comes when AI has a defined job, the right facts and clear rules, so it can take on the work you repeat every week.

This hands-on workshop, developed by Priority Management, shows you how to set up a personal AI agent inside the tool your organisation already owns. You will leave with a working AI agent for one part of your own role, built with the same WorkingSm@rt discipline we use in our own business.

This course will help you:

- Decide which work to hand to AI, and which work must stay with you
- Write a clear job description that gives AI the context it needs
- Keep AI accurate with a single source of facts it is allowed to use
- Make AI drafts sound like you and your organisation
- Set approval rules so nothing is sent, posted or changed without you
- Build a weekly routine that improves your AI agent over time

Related Training

- WorkingSm@rt using Copilot
- WorkingSm@rt with Microsoft Outlook + Copilot
- WorkingSm@rt Using AI for Business Professionals
- WorkingSm@rt Using AI for Sales Professionals

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Synopsis:

Turn your AI licence into a working AI agent that handles real, repeatable work, safely

- Do you use AI regularly, yet still start from a blank prompt every time?
- Do you spend hours each week on the same reports, emails, updates and summaries?
- Does AI give you answers that sound generic, or that you can't trust without checking every line?
- Are you unsure what you can safely share with AI, and what it should never do on its own?
- Has your organisation invested in Copilot or another AI tool without seeing the change in daily work?

By the end of this programme, participants will have built and tested a personal AI agent for one part of their role, with a written job description, a fact register, a voice guide, approval rules and a weekly routine, and the skills to build the next one themselves.

Unit 1: Being Productive with AI

- Revisit the WorkingSm@rt foundations: the Productivity Formula and the "Productivity Pirates" that steal your focus.
- Apply the 4D methodology (Do It Now, Date Activate It, Delegate It, Delete It) and the Value-Add Matrix to decide which tasks to delegate to AI.
- Choose one area of your role as the first job for your AI agent.

Unit 2: Writing the Job Description

- Write a role brief: who the agent is, what the work is for, who it serves and what good output looks like.
- Add goals, standard outputs and how each working session should start.
- Exercise: draft your AI agent's job description.

Unit 3: Feeding It the Facts

- Build a fact register: the only figures, claims and names your AI agent may use, each marked "use freely", "needs approval" or "never".
- Create a voice guide with words to use, words to avoid and approved examples.
- Choose and organise the reference files it should read.

Unit 4: Guardrails, Approval and Data Protection

- Set the golden rule: the agent drafts, you approve.
- Use status labels and an approval checklist on every output.
- Understand data privacy essentials, GDPR basics and your organisation's AI policy.

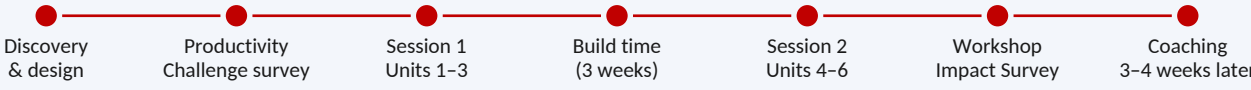
Unit 5: Connecting Your Everyday Tools

- Map the tools your AI agent can work with, such as Outlook, Teams, SharePoint and your CRM.
- Decide for each tool what the agent may read, what it may draft, and what it must never change.

Unit 6: Running Your AI Agent Week to Week

- Organise work into separate threads or conversations, one per task.
- Set a weekly routine: a start-of-week plan and an end-of-week report.
- Keep improving: log what worked, update the facts and refine the job description.

Your learning journey



A Better Way To Work

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