

✦ WORKSHOP INTRODUCTION

AI That Actually Helps

Transform real project data into client-ready updates in minutes using a proven four-step method: Extract → Structure → Summarise → Verify.

This workshop focuses on Programme + Progress Reporting — practical AI tools that save hours whilst maintaining quality and accountability.

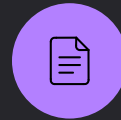


Examples of what you'll Be Able to Do in 60 Minutes



Milestone Digest

Create a comprehensive milestone digest from programme updates (PDF or P6 export).



Progress Narrative

Write a weekly progress narrative directly from an Excel dashboard.



Actions List

Produce a clean actions list with owners and dates placeholders.



Verification Loop

Apply a verification loop to avoid hallucinations and errors.

The Only Workflow We Use

1

Extract

Identify what matters from your source documents.

2

Structure

Organise into tables and clear headings.

3

Summarise

Create exec-ready narrative content.

4

Verify

Check sources, confidence, and assumptions.



Remember: AI = junior analyst. You = accountable reviewer.

Safe Use Rules

So IT Doesn't Ban It

Don't Paste

- Client names
- Pricing information
- Disputes
- Personal data

Do This Instead

- Use sanitised excerpts
- Redact sensitive documents
- Demand sources + confidence
- Human-in-the-loop for client-facing content

If unsure: ask AI what's missing or ambiguous before proceeding.

WHICH TOOL?

The Method Works in Any Tool

Use the one your IT team has approved

Use What's Approved

- An approved tool beats a better one you're not allowed to use
- Work accounts keep data under company controls
- Free personal accounts: sanitised material only
- Check the privacy / training setting first

Any of the Big Four

- Claude, Copilot, ChatGPT and Gemini all handle today's exercises
- Microsoft 365 Copilot now offers Claude models (admin-enabled)
- Free plans run smaller models with usage caps
- Paid and business plans add projects, longer files and agents

What Matters More

- A structured prompt: Role, Inputs, Steps, Checks, Output
- Sanitised, well-chosen inputs
- Sources and confidence on every claim
- Human review before anything goes out

□ **The method is the asset. The tool is replaceable — use the one your IT team has approved, and if you have nothing approved yet, use Claude's free plan with sanitised files today.**

Getting Started with Claude.ai

Sign In & Protect Your Privacy

How to Sign In

1. Go to claude.ai in your browser
2. Click "Sign up" (new users) or "Log in" (returning users)
3. Sign in with Google, or create an account with your email address
4. Verify your email if prompted
5. You're in — start a new chat

Turn Off Training Data Use

1. Click your profile icon (bottom-left corner)
2. Go to Settings → Privacy
3. Find "Help improve Claude" (or "Model Improvement")
4. Toggle it OFF — the switch should show as disabled
5. Click Save if prompted

 **Check this before your first session: on personal accounts, your chats may be used to improve future models unless this setting is off.**

Programme → Milestone Digest

Input: Programme update (PDF or P6 extract)

1

Milestone Table

Key milestones with dates organised clearly.

2

Executive Summary

8-bullet summary covering the next 6 weeks.

3

Risk Assessment

Top risks and constraints identified.

4

Validation Questions

5 questions to validate assumptions.

Prompt Template A

Programme Digest

You are my planning analyst. From this programme, extract key milestones (phase milestones, testing/live tests, IST, project finish). Output a table: Milestone | Date | Phase | Notes | Confidence (H/M/L) | Source (page/line). Then write an 8-bullet executive summary: what matters next, key schedule risks/constraints, and 5 questions to validate assumptions. If anything is ambiguous, say so and ask for what you need.

Copy and paste this prompt directly into your AI tool with your programme document.

Hands-On Practice

10 Minutes

01

Run Prompt A

Apply the template to the programme excerpt provided (bonus for making it better)

03

Alternative Method

If uploads fail: paste a small excerpt (20–30 lines) and run the same prompt.

02

Generate Outputs

Create milestone table, 8-bullet exec summary, and 5 validation questions.



DEMO 2

Progress → Weekly Narrative + Actions

Input: Progress dashboard or weekly update (Excel)

Overall Status

RAG status with clear reasoning.

Completed Items

What finished this period (max 6 bullets).

Blockers

What slipped or is blocked (max 6 bullets).

Lookahead

Next 2-week preview (max 8 bullets).

Action Items

Top actions with owners and dates placeholders.

Prompt Template B

Progress Narrative

You are my project controls assistant. Using the progress data provided, produce a weekly update in this exact format:

Overall status (RAG) + why

What completed this period (max 6 bullets)

What slipped / is blocked (max 6 bullets)

Next 2-week lookahead (max 8 bullets)

Top 8 actions with suggested owners + due dates (use placeholders if missing)

Then list Top 5 assumptions you made and how to verify each in the source data.

This template ensures consistent, comprehensive weekly updates every time.



Quality Gate

Before You Send Anything after AI touches it



Source Match

Does it match the source document?



No Fabrication

Any invented dates, percentages, or owners?



Confidence Labels

Are confidence labels included?



Assumptions Listed

Are assumptions explicitly stated?



Questions Raised

Are questions raised where data is missing?



Critical: If any answer is "No" → revise before sharing.

Breakout Groups

Lab 1

In groups of 3–5, use the site minutes (meetings 14–16) to create different outputs. Pick 1 spokesperson per group.

Delivery: D1 and D2

Weekly CM report, actions, and notices needed.

Commercial: C1 and C2

Events needing a notice or variation, plus 5 questions.

Leadership: L1

Develop 6-bullet exec update plus decisions needed.



Group Assignments

Find your group and take a seat

Delivery

D-1

Members:

- Jones Engineering — Contracts Manager (x3)
- Jones Engineering — Planner
- Ardmac — Associate Director of Project Management

Focus: Weekly reporting, programme and notices — contracts managers + planning

D-2

Members:

- Jones Engineering — Contracts Manager (x2)
- Co-operative Housing Ireland — Development

Focus: Delivery seen from both sides — contractor + client development

Leadership

L-1

Members:

- Jones Engineering — Operations Director
- Jones Engineering — Division Manager
- Jones Engineering — Regional Manager

Focus: What to allow, govern and back — operations + regional leadership

Commercial

C-1

Members:

- Jones Engineering — Senior Commercial Manager
- Jones Engineering — Lead Estimator / QS
- Riordan — Construction Claims Consultant

Focus: Change, valuations and claims — specialist contractor commercial

C-2

Members:

- Crosserlough Construction — Quantity Surveyor (x2)
- Ardmac — Quantity Surveyor

Focus: Tender review, valuations and variations — contractor QS

Debrief per group (spokeperson)

What worked, what didn't

Challenges

Takeaways You Reuse Tomorrow

The 4-Step Loop

Extract → Structure → Summarise → Verify

Your Templates

- Prompt A: Programme milestone digest
- Prompt B: Weekly progress narrative
- Assumptions + verification checklist
- Quality Gate before sending



Lunch Break

When we come back:

- From chat to repeatable workflows
- AI Agents
- Next steps