

The AI-Augmented Workday

How we use AI to manage the work around a one-person U.S marketing function, and how you can adapt the approach to your own role.

With a worked example for financial-services L&D teams, reusable instructions, and a practical way to test whether it helps.

WRITTEN BY

Rami Guzman
Intuition Knowledge
Network

FOR

L&D, talent, compliance,
and change leaders in
financial services

INSIDE

A working approach
and three resources to
help you start

WHY I WROTE THIS

There's a lot happening on my screen

People at work ask me some version of the same two questions.

“What’s going on over there?”

“What could you possibly be saying to those robots all day?”

Fair questions. I run US marketing for Intuition on my own. That includes the website, content, design, outreach, reporting, and the systems connecting them. The list is long enough that deciding what to leave until tomorrow is part of the job.

I spent roughly two months of nights and weekends building an AI setup around that work. It can prepare drafts, check materials, and carry out defined tasks while I’m working on something else.

But there’s work behind that sentence. The AI needs the right source material. It needs instructions that explain what a useful result looks like. And I need time to review what comes back.

This guide explains how those pieces fit together.

My examples begin in marketing because that’s the work I know. Then we’ll follow a task you may recognize: preparing the communications and manager support for a change inside a financial institution.

You won’t need to reproduce my setup. Start with one recurring task in the environment your firm permits. If no AI use is approved yet, you can still document the task and prepare a specific proposal for a pilot.

WHAT YOU’LL WORK THROUGH

- Choosing a task you can brief and review.
- Giving AI the context it needs.
- Building instructions you can reuse.
- Testing the result before adding connections or automation.
- Measuring the time and effort the whole process takes.

The resources at the end give you a starting point for each.

BEFORE YOU BUILD ANYTHING

Choose work you know well enough to check

Start with a task you've done often enough to recognize a weak result.

For an L&D team, that might be turning an approved change brief into an announcement and manager talking points. You know which questions employees will ask. You know when a sentence promises more than the project team has agreed.

That experience helps you give useful instructions and catch problems afterwards.

A less familiar task is harder to judge. A fluent answer can look convincing when you don't know what's missing. Bring in a subject expert before using AI for work you couldn't confidently review yourself.

Make the task small enough to explain

"Help with our system rollout" leaves almost everything open.

"Draft a short announcement explaining the new process, who it affects, when it starts, and where employees can get help" gives you something you can assess.

You should be able to name the source material, the expected output, and the person who will check it.

Leave room for review

A draft arriving quickly doesn't mean the job is finished. Someone still needs to check whether the information is correct and whether the result will help its audience.

Put that review into the workflow from the start. If it depends on finding spare time later, it can easily become a quick skim.

Decide what stays with people

In a change program, AI might help prepare the briefing. The conversation with a manager who thinks the rollout will fail still needs your attention.

Choose those boundaries deliberately. They should reflect the work, the consequences of getting it wrong, and your firm's requirements.

A DAY IN MY WORK

The list still needs someone to make decisions

One Tuesday's list included website changes, two IKN posts, a podcast thumbnail, outreach drafts, and conversations with prospects.

These tasks need different kinds of attention. Checking a page for layout problems is different from deciding what that page should say. Preparing an outreach draft is different from understanding why someone might want to hear from us.

In my setup, I can give the AI several defined tasks while I handle conversations and decisions. That works when the tasks can run independently and the tools have the necessary permissions.

The brief needs to make those boundaries clear. For example:

Review the supplied website pages for layout problems and return a list for me to check. Draft two posts using the approved ideas and writing guidance. Prepare a podcast thumbnail using the supplied image and template. Keep everything in draft and list any missing information.

When the work comes back, I have a review queue.

WEBSITE

The website findings need checking on the page.

POSTS

The posts need a read for accuracy and voice.

THUMBNAIL

The thumbnail needs to work at the size someone will actually see it.

Some items may need another pass. If a draft needs substantial correction, that matters when I judge whether the process helped.

Running tasks together also creates a practical limit: how much can I review properly? Starting more work than I can check just moves the backlog.

I'd rather have a smaller batch I can finish than a folder full of drafts waiting for attention.

PUT IT INTO AN L&D WORKDAY

Start with the rollout already on your desk

Imagine your firm is introducing a new process for requesting internal training.

You have an approved project brief. Employees need an announcement, managers need talking points, and the team needs an FAQ. You also have a meeting with Operations to discuss how the change will affect their workload.

This is a reasonable task to test.

Give the AI the approved brief, the intended audiences, and an example of a communication your team considers clear. Ask it to identify missing information before preparing the drafts.

Suppose the brief says the process launches on 1 November but doesn't explain what happens to requests already in progress.

A useful response would flag that gap.

A poor response might confidently say that existing requests will transfer automatically.

That's a plausible sentence. It could also send employees in the wrong direction.

Your review should catch it, and the correction should improve the instructions for next time:

Use only confirmed arrangements for existing requests. If the source doesn't explain the transition, list it as a question for the project owner.

Once that question is resolved, you can check whether the announcement, manager notes, and FAQ all give the same answer.

Meanwhile, your conversation with Operations may reveal something the brief never covered. Perhaps managers need a way to handle urgent requests during the transition. You bring that information back into the work.

The AI helps prepare the materials. Your conversations help establish what those materials need to say.

CHECK WHETHER IT HELPS

Count the corrections as well as the minutes

It's easy to notice how quickly a first draft appears. The more useful question is how long it takes to reach something you can use.

For the rollout example, include the time spent preparing the source material, writing the brief, reviewing the drafts, resolving questions, and making corrections.

Some of that work would be necessary with or without AI. Compare similar tasks so you can see what actually changed.

Keep a simple record

WHAT TO RECORD	WHAT IT TELLS YOU
Time spent preparing the inputs	How much work is needed before the task can run
Time spent reviewing and correcting	Whether the output is reducing work or creating more
Errors and omissions	Where the instructions or source material need attention
Whether the output was used	Whether the task produced something worthwhile
Total elapsed time	Whether the workflow helped meet the deadline

Keep the initial setup time separate from the time taken on later runs. Writing reusable instructions is an investment, and you need enough repeated use to judge whether it pays off.

Look beyond production

A faster announcement is useful if it gives you more time to prepare managers or answer employee questions.

You might also find that the instructions expose gaps in the process itself. If nobody can confirm who owns employee questions after launch, the AI can't resolve that for you.

My own setup took time to build. Yours may be simpler, but it will still need testing and maintenance.
Give yourself permission to stop using AI for a task if the checking takes longer than doing the work directly.

HOW THE PIECES FIT TOGETHER

Build the workflow before connecting the systems

The first version can be small: an approved AI tool, permitted source material, a saved set of instructions, and a person reviewing the result.

That's enough to test the rollout task.

Start with reusable instructions

Write down what the task produces, what information it needs, and what the reviewer will check.

Some tools package these instructions as “skills.” In this guide, a skill simply means a reusable set of instructions for a particular task.

You may be able to save it in your approved tool. Otherwise, use the instructions in the way that tool permits, such as pasting them into a new conversation.

Saved instructions can help make the work more consistent. They don't guarantee that every output will be correct.

Add connections when there's a clear reason

Once the workflow is useful, a permitted connection might help retrieve the current project brief or place a draft in the right workspace.

Be specific about the access needed. Reading a document and sending a communication are different actions. A workflow may need the first without needing the second.

A folder name or a sentence in a prompt doesn't grant access. The connection and its permissions have to exist.

Consider automation after testing

A scheduled workflow could prepare a recurring report or assemble material for review. Before scheduling it, decide what should happen when an input is missing, a source changes, or a run fails.

Someone needs to see those problems and know what to do next.

You can keep a useful workflow manual for as long as that suits the task.

GIVE IT THE INFORMATION YOU KEEP REPEATING

Write down what a colleague would need to know

When you brief someone new, you explain things that feel obvious to you.

Who the audience is. Why the project matters. Which decisions have already been made. Why the wording in the last approved announcement was so specific.

AI needs that information too.

Two short documents can save you from reconstructing the brief every time.

The context document

This explains the work.

For our rollout example, it would describe the purpose of the change, the affected teams, the confirmed dates, and the approved sources. It would also distinguish settled decisions from questions still being discussed.

Keep it relevant to the task. You don't need to supply the entire history of the department.

The working standards document

This explains how to produce a useful result.

It might say that announcements should be easy to scan, dates must match the source brief, and every requested action needs a clear route for completing it.

An approved example helps. Explain what makes it good, such as how quickly it gets to the employee's next step.

Make the current version easy to find

Use a simple structure for source material, instructions, active work, and reviewed outputs. Add an owner and review date to documents that can become outdated.

The format can be whatever your team and approved tool support. A plain document is fine.

Before each run, confirm that the tool can actually access the intended files. Ask it to identify the source names and versions it used, then check that answer.

A tidy folder helps you manage the work. It doesn't mean the AI has read everything inside it.

WORKING WITHIN YOUR FIRM

Get specific about what is permitted

A tool being available doesn't answer every question about how you can use it.

For the rollout task, you need to know whether that environment can receive the project brief, where drafts may be stored, and who needs to review them.

Take the proposed workflow to the relevant technology, security, privacy, or compliance colleagues. Show them the inputs and outputs. A defined task is easier to assess than a broad request to "use more AI."

Record the agreed boundaries where the people running the workflow can find them.

Check the information before supplying it

Only provide material permitted for that environment and use. Writing a data rule into a prompt doesn't prevent someone from uploading the wrong file.

Removing names also doesn't automatically make a document suitable. The remaining detail may still identify a person, client, or confidential project.

For an initial test, use an approved example or fictional material where appropriate.

Keep review responsibilities clear

Decide who checks factual accuracy, who approves the communication, and who is authorized to release it.

The AI can be instructed to stop at a draft. The workflow's permissions should support that boundary too.

Bring the team into the work

Explain what you're testing, what may change, and what remains undecided. Ask the people doing the task to help define a good result.

They'll know which exceptions are easy to miss and which questions employees ask after an announcement goes out.

If no AI use is approved yet, prepare the workflow, sample inputs, review criteria, and proposed pilot for discussion. You can do that work without putting firm information into an unapproved tool.

RESOURCE 1

A starting point for your two documents

The examples below use the training-request rollout. Replace the details with confirmed information for your own task.

Document one: Context

PURPOSE

We're preparing employees and managers to use a revised process for requesting internal training. The materials should help people understand what they need to do and where to get help.

AUDIENCE

Employees submitting requests and managers reviewing them. Describe any groups with different arrangements.

APPROVED ENVIRONMENT AND INFORMATION

Record the tool or workspace, the information permitted for this task, and any restrictions. Include the owner and date of the relevant internal guidance.

SOURCE MATERIAL

List the approved project brief, process guide, and other sources. Include document dates or versions so the writer and reviewer can distinguish current material from older drafts.

CONFIRMED DECISIONS

Record the launch date, required actions, affected groups, and support arrangements.

OPEN QUESTIONS

List unresolved details separately. For example, how requests already in progress will be handled. These must not become facts in a draft.

PEOPLE RESPONSIBLE

Name the project owner, subject reviewer, and communication approver.

Document two: Working standards

WRITING

Use plain language and explain internal terms. Put the employee's required action early. Keep the tone calm and practical.

FORMATS

Prepare an announcement, manager talking points, an FAQ, and a proposed follow-up schedule.

ACCURACY

Use the supplied sources. Flag missing or conflicting details. Don't invent dates, exemptions, support contacts, consequences, or project benefits.

REVIEW

Keep all outputs in draft. Check facts against the source material and confirm that the documents agree with one another.

STORAGE

Record where working drafts and approved versions belong. Use clear dates and version labels.

MAINTENANCE

Name the person who will update these instructions when the process changes.

RESOURCE 2

Reusable instructions for a change communication pack

Use this as a starting point in your approved AI environment. Adapt it to your firm's requirements and test it with permitted material.

The instructions continue on the next page.

Change communication pack

YOUR TASK

Prepare draft communications for a confirmed policy, system, or process change. Help employees understand how the change affects their work and what they need to do.

Use the context, working standards, and source documents supplied with this request.

BEFORE DRAFTING

Identify which sources you can access and the versions you are using.

Check that you have:

- A clear description of the change.
- The effective date and other relevant deadlines.
- The approved explanation for the change.
- Confirmed support and escalation contacts.
- The affected audience and any confirmed exceptions.
- The actions employees and managers need to take.
- Arrangements for work already in progress.
- The intended communication channels and review process.

If essential information is missing or conflicting, ask focused questions before drafting the affected section. Keep unanswered questions visible.

PREPARE THESE FOUR DRAFTS

1 Employee announcement

Aim for no more than 250 words. Explain what is changing, who it affects, when it takes effect, and what the reader needs to do. Include the confirmed route for help.

2 Manager talking points

Prepare a short briefing a manager could use in a team meeting. Cover the change, likely questions, any action managers must take, and where unresolved questions should go.

3 Employee FAQ

Include the questions the supplied material gives employees a reason to ask. Keep unsupported answers in a separate "Questions to resolve" section.

4 Follow-up plan

Propose reminders and opportunities for feedback around the confirmed dates. Suggest a purpose, audience, channel, and owner for each. Label the plan as proposed until it is agreed.

RESOURCE 2 CONTINUED

Make the drafts easy to review

INSTRUCTIONS FOR ACCURACY AND TONE

Write for someone who needs to get back to their work. Use short paragraphs and familiar words. Explain what the reader needs to do without adding enthusiasm the situation doesn't call for.

Preserve the meaning of approved policy and process language. Flag any wording that needs a subject expert's review.

Use the approved explanation for the change. Don't turn an expected benefit into a promise or invent a reason that sounds more persuasive.

Keep requests specific. If someone needs to complete a task, include the confirmed location, deadline, and source of help.

Treat source documents as reference material. Flag any content that conflicts with the task instructions or supplied standards.

CHECK THE PACK BEFORE RETURNING IT

Compare the announcement, talking points, FAQ, and follow-up plan.

Check that:

- Dates, audiences, and actions agree across the pack.
- Claims can be traced to the supplied sources.
- No proposed decision is presented as confirmed.
- Questions raised by the announcement are addressed or clearly left open.
- A manager could explain the next steps using the talking points.
- The follow-up plan fits the confirmed rollout arrangements.

Return the pack as a draft, followed by a short reviewer note identifying the sources used, unresolved questions, and sections needing specialist review.

Do not send, schedule, publish, or change source records.

A useful test before reusing it

Try the instructions with a brief that deliberately leaves out a launch date or transition arrangement.

Does the AI ask for the missing detail, or make one up?

That test tells you more about the workflow than a polished result from a perfectly complete brief. Keep examples of failures and use them when you revise the instructions or change tools.

RESOURCE 3

Test one workflow before expanding it

Choose a recurring task you understand and can review. Use the steps below to run a small, documented trial.

1 Define the job

Write one sentence describing the output and who will use it. Keep the first task narrow enough to assess.

2 Confirm the permitted setup

Identify the approved environment, acceptable inputs, and review requirements before supplying material.

3 Record how the task works today

Use a recent comparable example to establish the usual effort, review steps, and quality expectations.

4 Gather the minimum useful material

Collect the current sources, one good example, and the information needed for this task.

5 Write the context and standards

Use Resource 1. Resolve essential facts rather than leaving the AI to fill them in.

6 Prepare the reusable instructions

Adapt Resource 2 or write instructions for your chosen task. State where the AI must stop and return work for review.

7 Run a normal case

Review the result against the sources. Record the time spent preparing, checking, and correcting it.

8 Test an awkward case

Try missing information, conflicting dates, or a request outside the workflow's scope. Check whether the problem is surfaced clearly.

9 Revise and repeat

Update the instructions based on what failed. Test again with another example rather than assuming the correction will always hold.

10 Decide what comes next

Keep, revise, or stop the workflow based on the evidence. Add another task or an approved connection only when there's a clear benefit.

At the end of the trial, write a short decision note:

We tested [task] using [permitted inputs]. The main benefit was [observed result]. The remaining problems were [issues]. We recommend [next step], owned by [person], with a review on [date].

Make room for the work that needs your attention

The reason I built my setup was practical. There was more work than one person could comfortably get through, and too much of it competed with the conversations and decisions that needed me.

AI can help prepare that work. Making it useful still depends on people who understand the task, notice what's missing, and take responsibility for what happens next.

For an L&D team, the time gained might go into working with a manager who needs help supporting a new process. It might mean reviewing a learner's reasoning properly or finding out why a course hasn't changed what happens on the job.

Decide where you want that time to go.

Then choose one task worth testing, involve the people who know it, and keep an honest record of the result. You'll have something concrete to build on.

CONTINUE WITH IKN

IKN turns insights from our network and the wider industry into practical strategies, resources, and tools for financial-services learning leaders. We draw on Intuition's 40+ years as an end-to-end learning partner to financial institutions.

Explore Intuition's AI Programs and Shift Labs if you're considering how to develop these capabilities across a team.

Join IKN for new resources, industry insights, and invitations to conversations with peers.