

Todd Brook Workshop:
Mastering the Three Steps to Building AI Automation for PEMA Members
October 9, 2024

Todd Brook conducted a webinar for PEMA members on October 9, 2024. [A link to the presentation is here.](#)

A summary of the presentation, provided by Todd, is below.

Meeting Purpose

Provide an advanced tutorial on building AI automation using prompts, assistants, and workflow integration.

Key Takeaways

- AI automation involves three core steps: perfecting prompts, developing AI assistants, and integrating workflows
- Effective prompts follow the POINT framework: Persona, Objective, Information, Nuances, Target
- OpenAI's API can be used to create specialized assistants for specific tasks
- Workflow automation tools like Zapier can integrate AI assistants into business processes

Topics

Advanced Prompting Techniques

- Introduced the POINT framework for crafting effective prompts:
 - Persona: Define AI's role and knowledge base
 - Objective: Specify the goal clearly
 - Information: Provide necessary context and data
 - Nuances: Clarify any specific requirements or preferences
 - Target: Define the desired output format
- Emphasized the importance of saving and refining prompts for reuse
- Demonstrated how to iteratively improve prompts based on output

Developing AI Assistants

- Walked through the process of creating an AI assistant using OpenAI's API
- Showed how to set up an OpenAI enterprise account and navigate the dashboard
- Demonstrated creating a specialized "meeting translator" assistant
- Explained the importance of testing and refining assistant instructions

Integrating AI into Workflows

- Introduced Zapier as a tool for connecting AI assistants to other business applications
- Demonstrated a workflow that:
 1. Captures meeting transcripts from Fathom
 2. Sends transcript to AI assistant for summarization

3. Creates a draft email with the summary
- Emphasized the importance of human oversight in automated workflows
- Discussed potential for connecting multiple AI assistants and tools in complex workflows

AI Security and Compliance

- Discussed the importance of SOC 2 Type 2 compliance for data security
- Recommended using ChatGPT's Team Plus plan for handling sensitive business data
- Cautioned against using client data without explicit permission or data processing agreements
- Emphasized the need for human oversight and accountability in AI-driven processes

AI Tools and Platforms

- Recommended Perplexity.ai for general, non-sensitive queries due to high accuracy (92%)
- Suggested ChatGPT Team Plus for business use, citing strong security credentials
- Mentioned BoxAI as a secure option for data storage and AI processing
- Discussed the capabilities and limitations of AI in analyzing technical drawings and images