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DAY 1: AI DELEGATION MASTERY - STUDENT HANDOUT

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THE PACE FRAMEWORK & THE MANAGERIAL STANCE

Professor Mark Price | University of St. Thomas | January 2026

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THE CORE INSIGHT: WHY AI FRUSTRATES YOU

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The problem isn't you. The problem isn't AI.

✗ PROMPTING (What Most People Do):
"Hey AI, do something" → vague, hopeful, unpredictable results

✓ DELEGATING (What Professionals Do):
Clear instructions like you'd give a talented intern → specific, reliable results

KEY TAKEAWAY: Today you'll learn to delegate like a manager, not prompt like a beginner.

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THE PACE FRAMEWORK: 4 ELEMENTS OF SUCCESSFUL AI DELEGATION

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P - PERSONA: Who is the AI acting as?
"You are a [specific role with X years experience in Y domain]"
Example: "You are a senior project manager with 10 years experience"

A - ACTION: What specific task must be completed?
Include the format: bullet points? paragraphs? table?
Example: "Draft a 3-paragraph email..." (not "write an email")

C - CONTEXT: What background information does the AI need?
Include: situation, constraints, audience, background
Example: "The delay is due to vendor issues. Stakeholders are already frustrated."

E - EXAMPLE: What does good output look like?
Specify: tone, length, style, quality bar
Example: "Professional tone, 3-4 paragraphs, use bullet points for action items"

PRO TIP: When you include all 4 elements, AI goes from frustrating to fantastic.

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PACE IN ACTION: SIDE-BY-SIDE COMPARISON

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BAD PROMPT **✗**:
"Write an email about the project delay."
→ AI guesses everything. Results are generic and useless.

GOOD PROMPT **✓** (with PACE):
PERSONA: "You are a senior project manager with 10 years experience."
ACTION: "Draft an email to stakeholders explaining a 2-week project delay."
CONTEXT: "The delay is due to vendor technical issues, but we have a mitigation plan. Stakeholders include VP of Operations and department heads who are already frustrated with other delays this quarter."
EXAMPLE: "Confident tone (not apologetic). Structure: (1) New timeline, (2) Root cause (brief), (3) Mitigation plan in bullets, (4) Next milestone. 3-4 paragraphs."
→ AI has clear direction. Results are specific and usable in 30 seconds.

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10 COPY-PASTE PROMPTS BY INDUSTRY

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FINANCIAL SERVICES

1. COMPLIANCE COMMUNICATION

PERSONA: "You are a compliance officer at a regional bank with 20 years experience."

ACTION: "Draft an internal memo to branch managers explaining new customer identification requirements."

CONTEXT: "New rules require additional verification for accounts over \$25,000. Effective April 1st. Managers are overwhelmed with regulatory changes."

EXAMPLE: "Reassuring but firm tone. Include: (1) What's changing, (2) Why it matters, (3) 3 simple steps, (4) Where to get help. Under 400 words. Use headers and bullets."

2. CLIENT MARKET VOLATILITY EMAIL

PERSONA: "You are a wealth advisor with 15 years managing high-net-worth clients."

ACTION: "Draft an email to clients explaining recent market volatility."

CONTEXT: "Market dropped 8% this week. Clients are nervous. We're staying the course with long-term strategy."

EXAMPLE: "Calm, confident tone. Structure: (1) Acknowledge situation, (2) Our position, (3) What we're monitoring, (4) Invitation to call. 250-300 words."

HEALTHCARE

3. PATIENT POLICY CHANGE

PERSONA: "You are a patient relations manager with nursing background."

ACTION: "Draft a letter explaining new ICU visitor policy."

CONTEXT: "Limiting to 2 visitors, 10am-8pm due to infection control. Previous policy was unlimited 24/7. Must comply with HIPAA."

EXAMPLE: "Empathetic tone. Structure: (1) What's changing, (2) Why (safety), (3) Exceptions, (4) How to designate visitors. 250-300 words."

4. STAFF SCHEDULING CHANGE

PERSONA: "You are a healthcare operations manager."

ACTION: "Draft a staff memo about new shift scheduling system (Deputy app)."

CONTEXT: "Moving to digital system in 2 weeks. Staff nervous about tech changes."

EXAMPLE: "Empathetic tone, acknowledge concerns. Include 3 benefits. Under 300 words."

RETAIL & E-COMMERCE

5. NEGATIVE REVIEW RESPONSE

PERSONA: "You are a customer experience manager at a retail chain."

ACTION: "Draft a response to this Google review: 'Waited 20 minutes. Staff ignored me. Never coming back.'"

CONTEXT: "Happened during holiday rush. Understaffed due to call-outs. We value this customer."

EXAMPLE: "Apologetic but not defensive. (1) Thank them, (2) Apologize specifically, (3) Explain briefly, (4) Invite back with 20% discount. 3-4 sentences. Sound human."

6. PRODUCT LAUNCH EMAIL

PERSONA: "You are a marketing manager for a sustainable home goods brand."

ACTION: "Write a product launch email for eco-friendly cleaning line."

CONTEXT: "Launching in 2 weeks. Target: eco-conscious consumers 30-50. Premium price, refillable packaging. 50K subscribers."

EXAMPLE: "Engaging tone. Structure: subject line, problem (plastic waste), product features (3-4 bullets), 15% launch offer, CTA. 200-250 words. Create urgency."

PROJECT MANAGEMENT

7. PROJECT DELAY UPDATE

PERSONA: "You are a senior project manager."

ACTION: "Draft update email explaining 2-week delay."

CONTEXT: "Delay due to vendor technical issues. Internal system upgrade. Stakeholders frustrated."

EXAMPLE: "Confident tone. (1) New timeline, (2) Root cause, (3) Mitigation plan (bullets), (4) Prevention steps, (5) Next milestone. 3-4 paragraphs."

8. WEEKLY STATUS REPORT

PERSONA: "You are a program manager running 5 projects."
ACTION: "Create weekly status report template for leadership."
CONTEXT: "C-suite audience, time-constrained. Needs RAG status for each project."
EXAMPLE: "Dashboard format. Include: project name, RAG status, this week's wins (2-3 bullets), next week priorities, blockers. 2 pages for 5 projects."

GENERAL BUSINESS

9. NEW EMPLOYEE WELCOME

PERSONA: "You are a department manager."
ACTION: "Draft welcome email for Sarah Chen, Software Engineer, starting Monday."
CONTEXT: "She reports to you. Team excited. Welcome lunch planned Wednesday."
EXAMPLE: "Warm tone. Include: welcome, first day logistics, first week overview, point of contact, excitement. 150-200 words."

10. BUDGET VARIANCE EXPLANATION

PERSONA: "You are a department manager."
ACTION: "Draft email explaining 12% Q3 budget overage."
CONTEXT: "Overage due to emergency equipment replacement (\$15K). Unavoidable. Cost savings planned for Q4."
EXAMPLE: "Factual, not defensive. (1) Acknowledge variance, (2) Root cause, (3) Why necessary, (4) Q4 mitigation plan, (5) Year-end forecast. 200-250 words."

ADVANCED TECHNIQUES (3 METHODS)

1. PROGRESSIVE PROMPTING: Don't expect perfection in one shot
→ Start with basic PACE → Review → Refine with follow-ups → Iterate
Example: Round 1: Get draft. Round 2: "Make it shorter and more direct."
Round 3: "Add bullet list of 3 action items."
2. CHAIN OF THOUGHT: For complex reasoning, ask AI to show its work
"Analyze this data. First, identify top 3 patterns. Then explain what each indicates. Finally, recommend 2-3 changes based on that analysis."
3. RAG (Retrieval Augmented Generation): Ground AI in YOUR data
Upload your company documents, then ask questions about them.
Example: "Here's our employee handbook [upload]. Based on this, explain our PTO policy in 3 bullets."

RISK MANAGEMENT: 3 CRITICAL RISKS

RISK #1: HALLUCINATIONS (AI making stuff up)
Problem: AI invents fake statistics, citations, case law
Protection: ALWAYS verify facts before sharing externally

RISK #2: DATA PRIVACY
Never input: Customer PII, confidential data, trade secrets, SSNs, passwords
Safe to input: Generic scenarios, anonymized examples, public information
Rule: If you can't email it to a random person, don't put it in AI

RISK #3: COMPLIANCE (HIPAA, Finance Regulations)
Healthcare: ❌ Never input patient identifiable information
 ✅ Use generic scenarios, no PHI
Finance: ❌ Never input account numbers, transactions, SSNs
 ✅ Use anonymized scenarios, policy questions

KEY INSIGHT: Your industry's regulations still apply to AI use.

AI AGENTS: THE FUTURE

TODAY: ChatGPT as COPILOT

- You ask, it answers
- Human-in-the-loop
- GPS metaphor (you drive)

COMING: AI AGENTS

- You set goal, it executes
- Human-on-the-loop
- Self-driving car metaphor

Example:

Copilot: "Draft email to vendors asking for quotes"

Agent: "Research 5 vendors, draft custom emails to each, schedule follow-ups"

WHY IT MATTERS: Companies will need people who can manage AI agents.

Start learning agentic thinking NOW.

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YOUR WEEK 1 ACTION PLAN

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DAY 1 (MONDAY):

- Use 2-3 prompts from library above
- Track time: How long without AI vs. with AI?

DAY 2-3 (TUE-WED):

- Refine prompts based on results
- Add 2 new workflows to automate

DAY 4-5 (THU-FRI):

- Calculate total time saved this week
- Mention AI wins in a meeting
- Help one colleague

WEEK 2 GOAL: Have 5-7 reliable prompts you use regularly. Save 3-5 hours/week.

TIME SAVINGS TRACKER:

Task	Before AI	With AI	Saved/Week
Weekly report	3 hours	45 min	2.25 hrs
Emails	5 hours	2 hours	3 hrs
Meeting notes	2 hours	30 min	1.5 hrs
TOTAL			6.75 hrs

GOAL: Save 5+ hours per week within one month.

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BECOMING "THE AI PERSON": CAREER STRATEGY

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WEEK 1-2: Demonstrate Results

→ Automate 3-5 tasks, track time saved, document before/after

WEEK 3-4: Share Success

→ Mention in meetings, offer to help colleagues, volunteer for AI initiatives

MONTH 2-3: Scale Impact

→ Create team guidelines, lead lunch-and-learn, propose pilot projects

PERFORMANCE REVIEW LANGUAGE:

"I've implemented AI workflows that save me 8 hours/week, redirected to [strategic project]. I'm helping the team adopt safely."

RESUME UPDATES:

Before ❌: "Created weekly reports"

After ✅: "Automated report generation using AI, reducing time by 70%"

Remember: Last person laid off = the AI person.

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COMMON MISTAKES & FIXES

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- MISTAKE #1: Prompt too vague → FIX: Add all 4 PACE elements
- MISTAKE #2: One-and-done → FIX: Use progressive prompting, refine 2-3 times
- MISTAKE #3: Expecting perfection → FIX: Aim for "AI does 80%, I refine 20%"
- MISTAKE #4: Not saving prompts → FIX: Build personal prompt library
- MISTAKE #5: Forgetting to verify → FIX: Always fact-check before sharing

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KEY TAKEAWAYS

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- ✓ MINDSET SHIFT: Stop "prompting" AI. Start "delegating" to it.
- ✓ PACE FRAMEWORK: 4 elements = Persona, Action, Context, Example
- ✓ ADVANCED TECHNIQUES: Progressive prompting, Chain of Thought, RAG
- ✓ RISK MANAGEMENT: Hallucinations, data privacy, compliance
- ✓ CAREER POSITIONING: Become "the AI person" in your organization
- ✓ ACTION PLAN: Week 1 starts Monday. You have 10 prompts ready.

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RESOURCES

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-  Prof. Mark Price: price@stthomas.edu
-  Newsletter: profmarkprice.substack.com (weekly insights, new prompts)
-  ChatGPT: chat.openai.com

PREVIEW DAY 2:

- NotebookLM: Turn documents into insights
- ChatGPT Deep Research: Beyond Google
- Use Case Development & Change Management

PREVIEW DAY 3:

- ChatGPT in Excel: Automate data analysis
- Build AI Agents for monthly reports
- Save 240-480 hours/year on Excel