Personal Productivity Wins — Quick Reference

AI Education Series · Module 2
Keep this at your desk

THE FOUR PATTERNS

PATTERN 1 Email — situation, relationship, outcome

"Draft an email to a longtime customer explaining their order ships three days late. Warm but professional, take ownership without over-apologizing, offer expedited freight at our cost, under 120 words."
Every constraint shows up in the draft. Best on hard messages. For replies: paste the (non-sensitive) thread + "draft my reply — I want to say roughly this..." Read the draft **out loud** before sending.

PATTERN 2 Meeting notes — four outputs, one prompt

"Here are my rough notes. Produce: (1) a five-line summary, (2) decisions made, (3) action items as a table with owner and due date, (4) a short follow-up email to attendees."
Fragments are fine. Check the action table — unnamed owners and dates may get guessed. A transcript of a sensitive meeting is still sensitive.

PATTERN 3 First drafts — skeleton in, two versions out

Give the purpose, audience, the 3–5 points that must appear, and rough length. Ask for **two versions** in different structures — picking beats writing. Then the most underused move in AI writing: *"Ask me five questions that would make this draft better."*

PATTERN 4 Rewriting — name the transformation

"Shorter" · "plainer" · "for a customer" · "for an executive." The de-escalation pass: paste the frustrated draft, ask for the professional version, send that one. With numbers: *"keep every number exactly as it is"* — then verify. Rewrites are where figures quietly change.

THE TRIGGER LIST — WHEN TO REACH FOR IT

About to write anything longer than three sentences	**Draft with AI first**
Just left a meeting with notes	**Summary + actions before you forget**
Staring at a blank page	**Skeleton prompt, two versions**
About to send something written in frustration	**De-escalation pass**
Re-reading a long document	**Summarize, then ask questions**

Pick **two** triggers and commit to them for two weeks — that's how this becomes muscle memory.

The rules ride along: use the account your company provides · nothing sensitive goes in (use made-up sample text when in doubt) · AI drafts, **you decide** — everything gets your review before it goes anywhere real.

Questions any time: your internal AI point of contact, or your TeamLogic IT team.

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