Ethical Considerations and Introduction to Generative AI

Before adopting any AI tools as part of your workflow, it's paramount to consider your clients' perspectives on AI use, especially regarding privacy concerns, tool compatibility, and overall comfort with technology. Ensuring compliance and maintaining trust are foundational to successfully integrating AI into our services.

- Privacy Concerns: Understand and address any apprehensions your clients may have about data security and privacy.
- Tool Compatibility: Ensure the AI solutions you consider are compatible with your clients' existing systems.
- Client Comfort: Gauge and respect how comfortable your clients are with the use of AI in managing their data and tasks.

Starting with these considerations sets a responsible framework for all subsequent AI interactions and applications. By prioritising client comfort and ethical considerations, you establish a baseline of trust and responsibility that enhances all aspects of virtual assistance

What is Generative AI?

Generative AI is a type of artificial intelligence that learns from existing data to create new, original content, such as text, images, music, or code. It does this by identifying patterns and relationships within massive datasets and then using that understanding to generate novel outputs in response to prompts or questions.

Section 1

Why VA's Need to Learn Generative AI

Generative artificial intelligence or Generative AI refers to the use of AI to create new content, like text, images, music, audio, and videos. The common use of Generative AI is to:

- Improve customer interactions through enhanced chat and search experiences
- Explore vast amounts of unstructured data through conversational interfaces and summarisations
- Assist with repetitive tasks like replying to requests for proposals (RFPs), developing marketing content, creating documents for compliance, and more.

Important reminders when using Generative AI

1. Before you use Generative AI in your work with the client, make sure to ask for permission from the client for transparency.
2. Never use the result from the AI as the final output. Always check and review the output generated by AI and make sure that it matches with the expected output by the client and their customers.
3. Remember clients know if an output is generated by AI so make sure to add your own, human element to it.
4. Consider if the details in the output generated by AI are relevant to the instructions of the clients and remove those that are not relevant.
5. Use generative AI only for general use. Never add confidential information unless advised or agreed by the client.

AI Tools for Everyday VA Use

Choosing the Right AI for the Job

Standard Models – Fast, great for simple tasks like summaries or rewrites.

Reasoning Models – Better for multi-step problems and strategic tasks.

Deep Research Models – Use for high-stakes, in-depth analysis (trade speed for depth).

Below is a list of AI tools that you can use for your work with the client. Most of these are used by VE. We have grouped them according to their uses. *Click the name to link to the tool.*

AI Tools for emails, memos, documentations and meeting summaries

- **Grammarly**- enhances written communication by providing advanced grammar, spelling, and style checks.
- **ChatGPT** - versatile tool for generating text, answering questions, and supporting various content-creation tasks.
- **Otter.ai** - excellent for transcribing meetings and generating summaries, making it easier to capture important information.
- **Granola.ai** - automatically transcribes, summarises, and analyses meetings and acts as a live notepad that enhances the context pulled straight from the transcript.

AI Tools for calendar management, find meeting times, protect focus time, client booking and automated reminders.

- **Calendly** - popular choice for client meetings, it uses AI to manage automated reminders and simplified scheduling for clients

Section 2

- **Reclaim.ai** - Focuses on protecting your time by scheduling habits, breaks, and time blocks automatically, making it ideal for habit protection and time blocking.

- **Lindy.ai** - Automates the entire meeting and workflow scheduling process using AI agents that understand context, find the right times, and send invites.

AI Tools for research and Information

- **Perplexity AI** - Delivers direct, cited answers to complex queries by analysing large volumes of data, perfect for research and decision-making.
- **Socratic** - A helpful tool for getting quick, easy-to-understand explanations and solutions to research questions.

AI Tools for for project management

- **Asana** - for AI-assisted goal setting and project creation.
- **ClickUp** - for teams looking for powerful automations and customisation.
- **Trello** - for visual thinkers who love Kanban boards and AI-powered content generation.
- **Notion** - for teams that want integrated AI writing and Q&A features.

AI Tools for creatives and design

- **Canva** - An accessible platform that uses AI to streamline the design process for users of all skill levels, including an all-in-one AI assistant.
- **Adobe Sensei**: The underlying AI technology for intelligent features across Adobe's suite of creative products.
- **Runway** - A platform simplifying the use of machine learning for various creative tasks, including image and video generation.

Prompting Fundamentals

Prompt is a user's input—an instruction, question, or piece of text—that serves as a guide for the AI model to produce a specific output, such as text, images, or code.

What to consider when writing a prompt

When writing an AI prompt, there are four key areas to focus on: <u>Persona</u>, <u>Task</u>, <u>Context</u>, and <u>Format.</u>

Persona – refers to the information you provide about yourself when writing an AI prompt. Assign a role to the AI (e.g., "You are a senior marketing manager…").

Task – refers to the actual task you're telling AI to perform. Use clear action verbs (e.g., create, summarize, rewrite, analyze).

Context – Add the background information the AI needs. It is a great way to tell AI *how* you want to perform a task.

Format – Tell the AI exactly how you want the response (e.g., bullet points, table).

Prompting Techniques

Zero-Shot Prompting - No examples needed—just a clear, structured prompt.

Few-Shot Prompting - Include one or more examples to "show" the AI what good looks like.

Step-Back Prompting - Start broad to help the AI gather relevant knowledge before narrowing in.

Chain of Thought (CoT) - Add phrases like "Let's think step by step" to improve logic and reasoning.

Section 3

Tips for effective prompting

Understanding how AI works can help you write effective prompts that generate better results. Let's look at some tips to help you write better prompts.

- **Use natural language**. Using natural language is one of the most critical parts of effective AI prompting. You should write your prompts in a way that mimics everyday speech. That way, AI tools can better understand what you're asking for. The words you use and the way you phrase things can significantly impact the output you receive. Try phrasing your prompts differently if you're having trouble getting the results you want from AI tools, and you'll learn what works and what doesn't.

- **Provide clear and detailed instructions.** Whether you want AI to create a script or refine your writing, you must tell it precisely what you want. When you write an AI prompt, provide clear and detailed instructions about the task.

- **Keep your prompts concise and straightforward.** Details are good, but lengthy prompts with too many details can confuse AI tools. Add essential details, but keep your prompts concise and straightforward to ensure they're easy to parse.

- **Be conversational.** Write your prompts like you're talking to a person to get more interactive results. If you don't get the results you're looking for, tell AI how to improve those results until you get what you want.

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