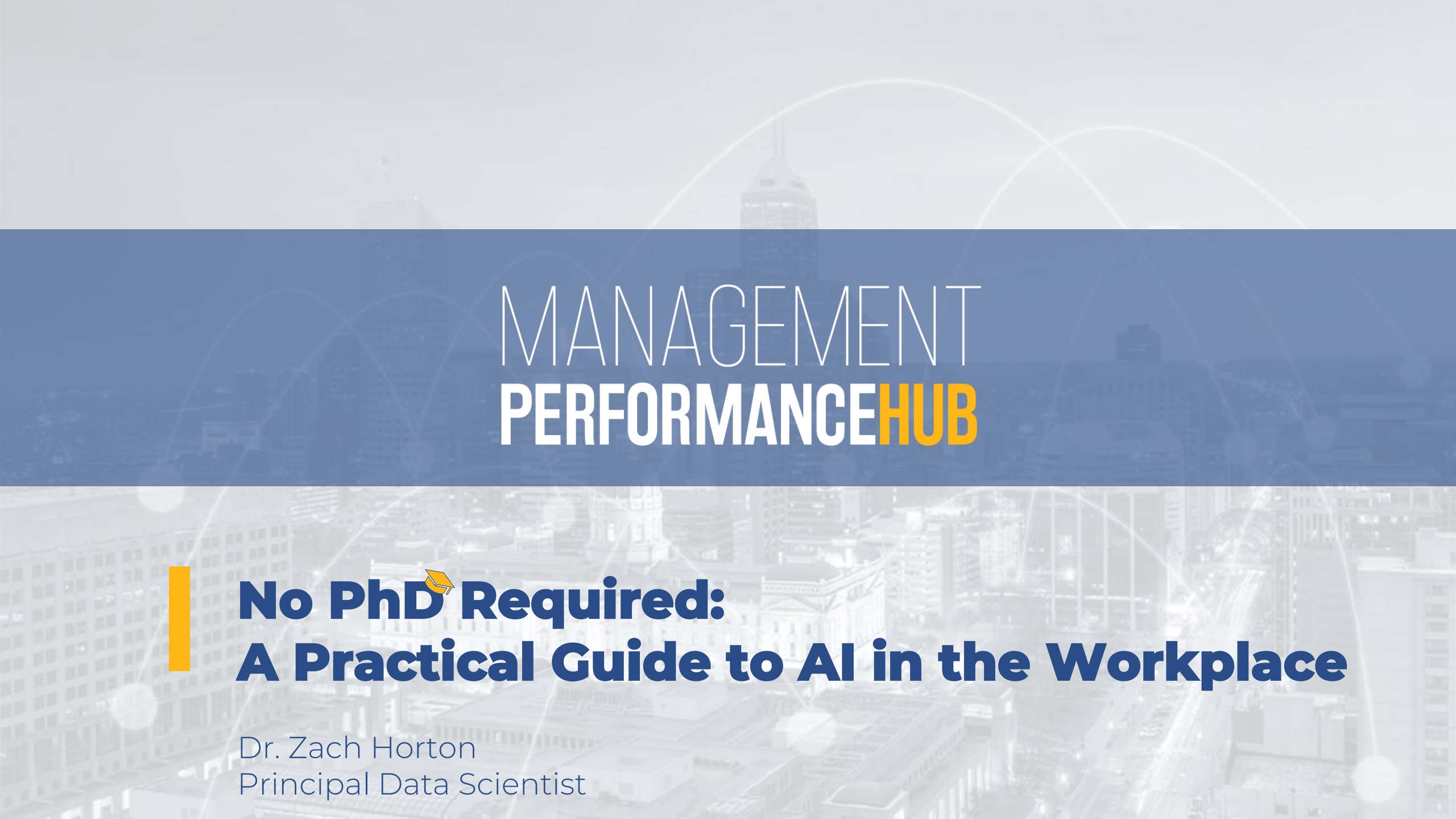




MANAGEMENT PERFORMANCEHUB



No PhD Required: A Practical Guide to AI in the Workplace

Dr. Zach Horton
Principal Data Scientist

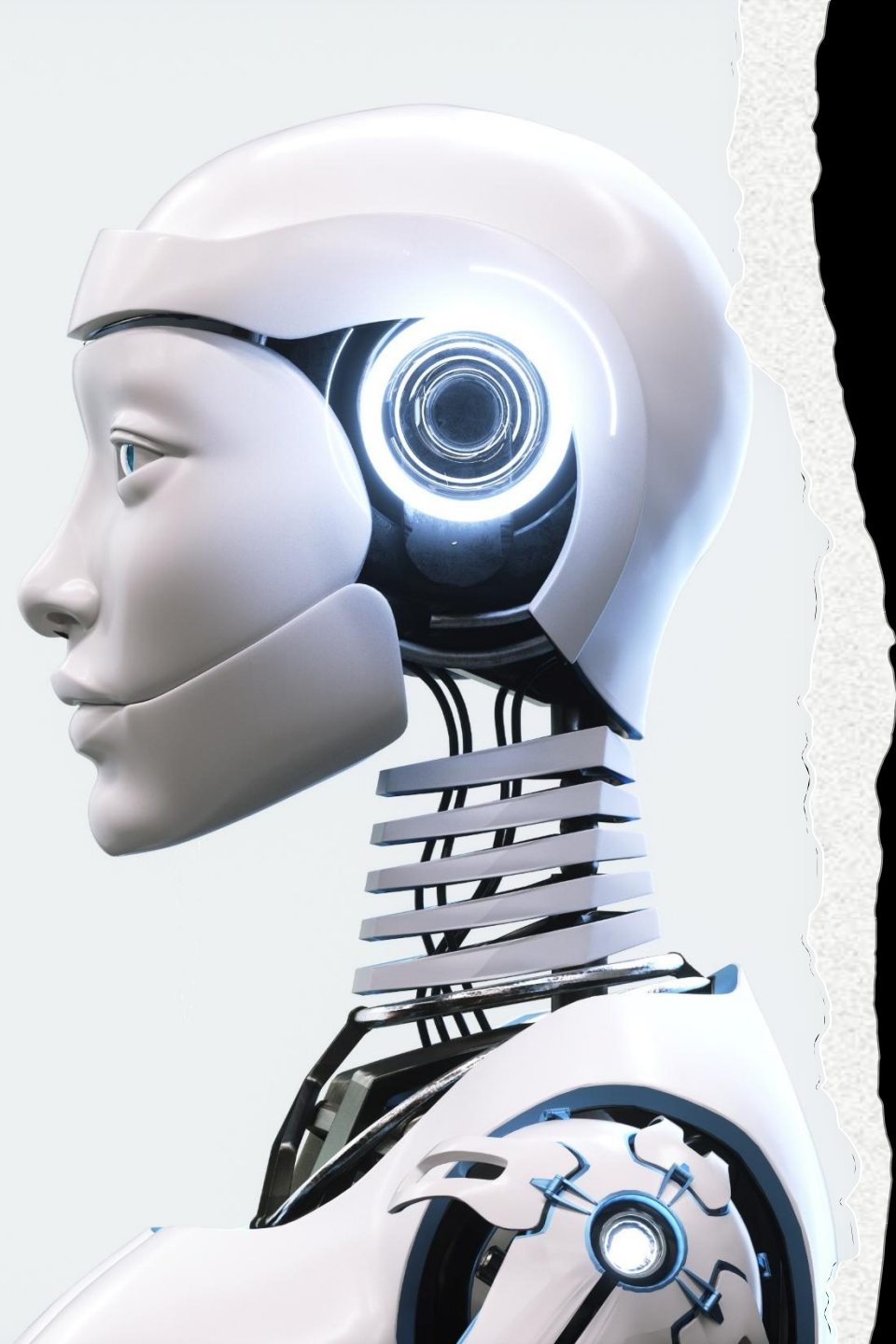
The AI Marketing Experience...

“AI WILL CHANGE
EVERYTHING!”





“The next industrial
revolution”



“A Quantum Leap in Cognitive Automation”

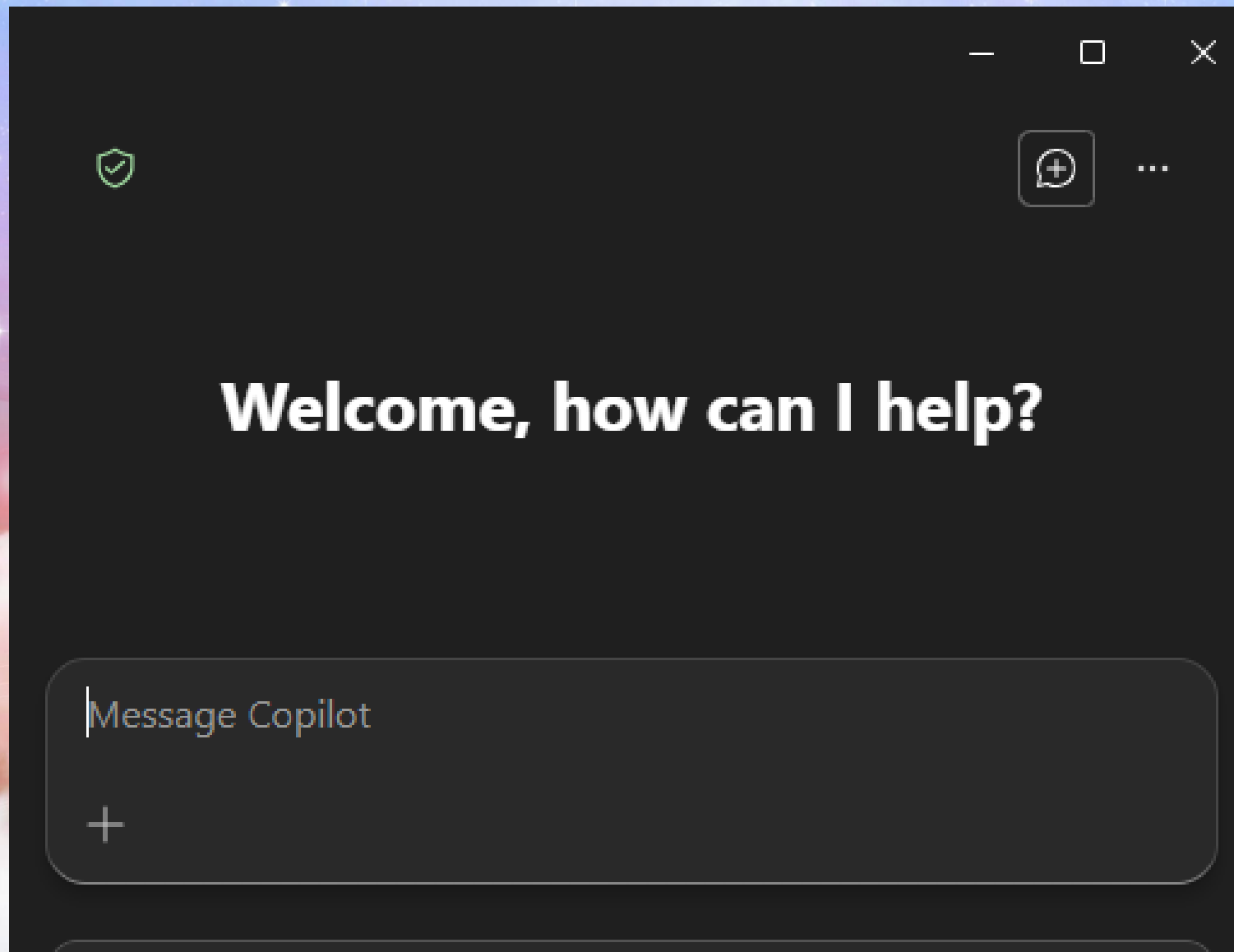


“Cognitive Power Unleashed”

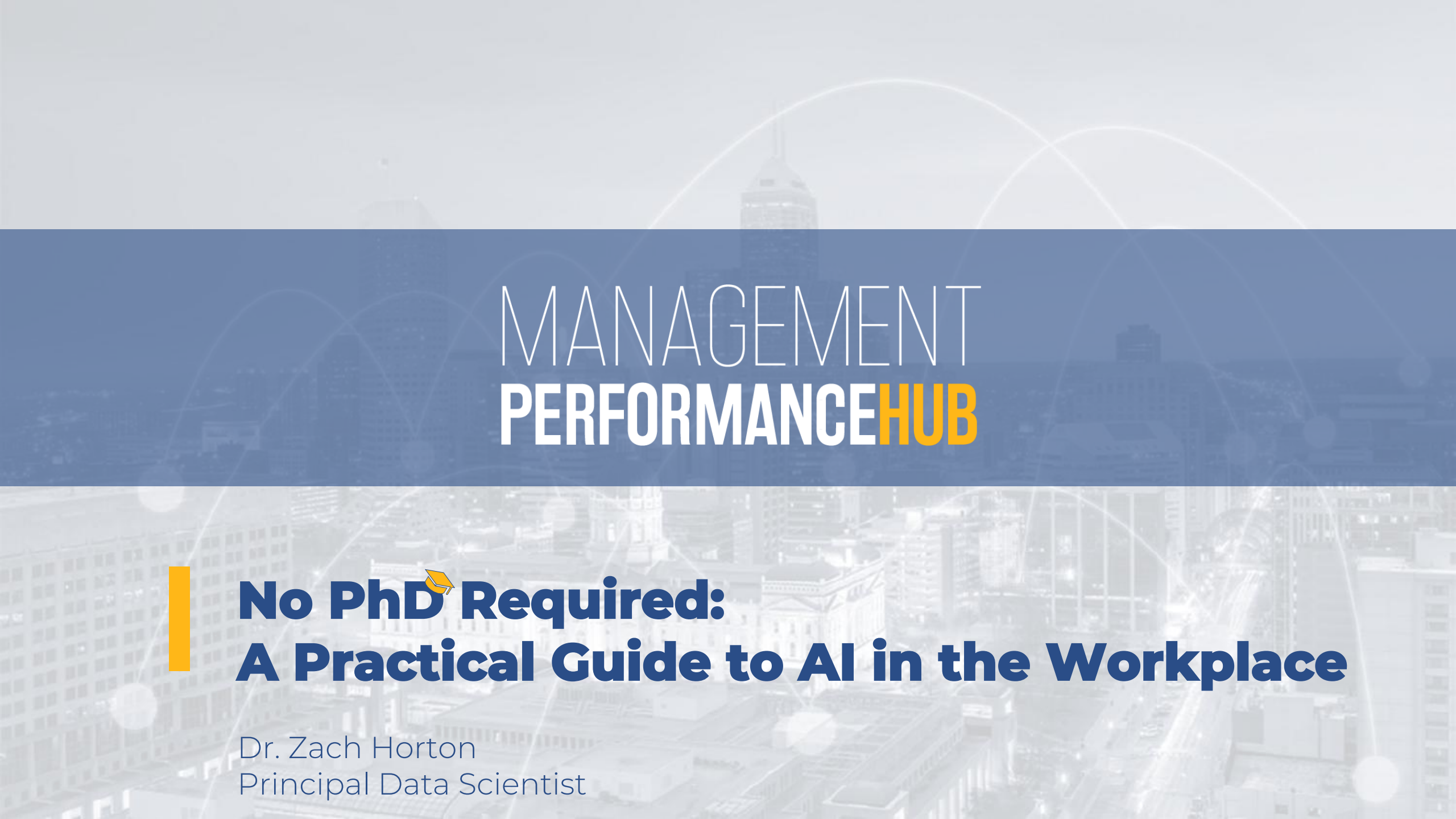


“A New Age, Bursting To Life”





Now what?



MANAGEMENT PERFORMANCEHUB



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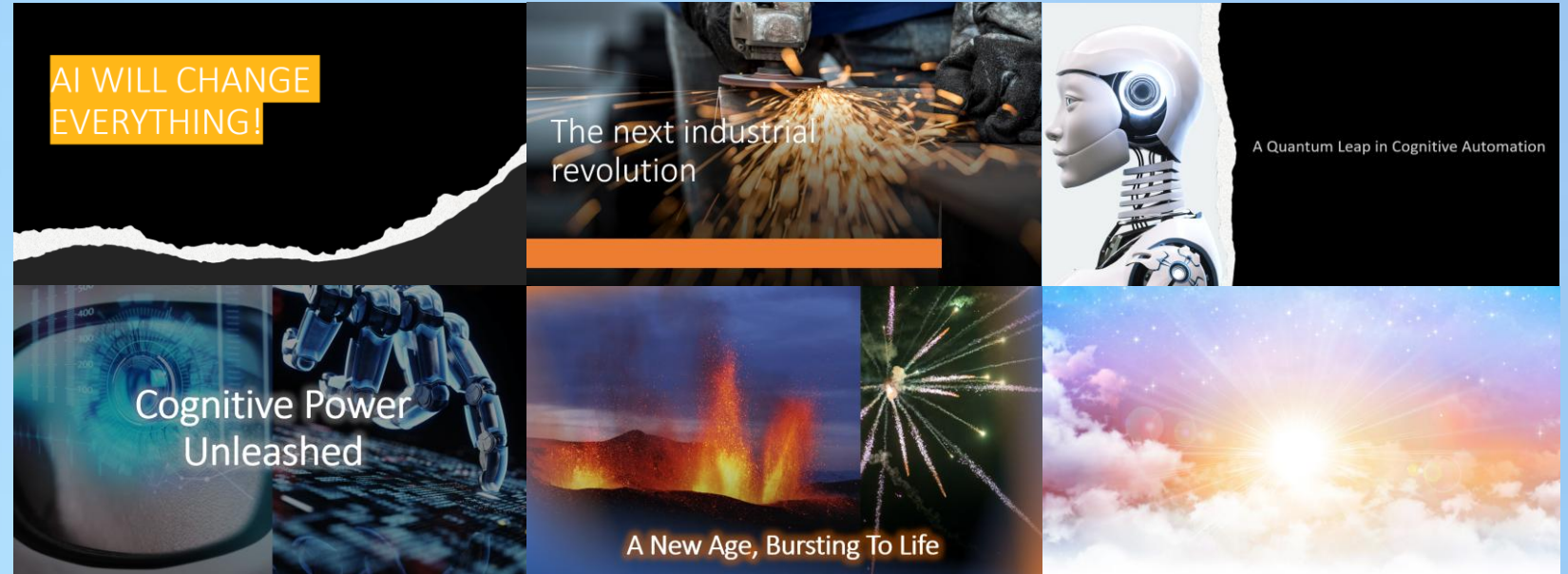


The Root of the Problem



Now what?

The Root of the Problem



The Root of the Problem



The Root of the Problem



The Root of the Problem





| The Root of the Problem

AI is special *because* of the problems it can solve



A Problem-First Mentality

First, the problem

- Need to hang art on the wall

Then, the solution

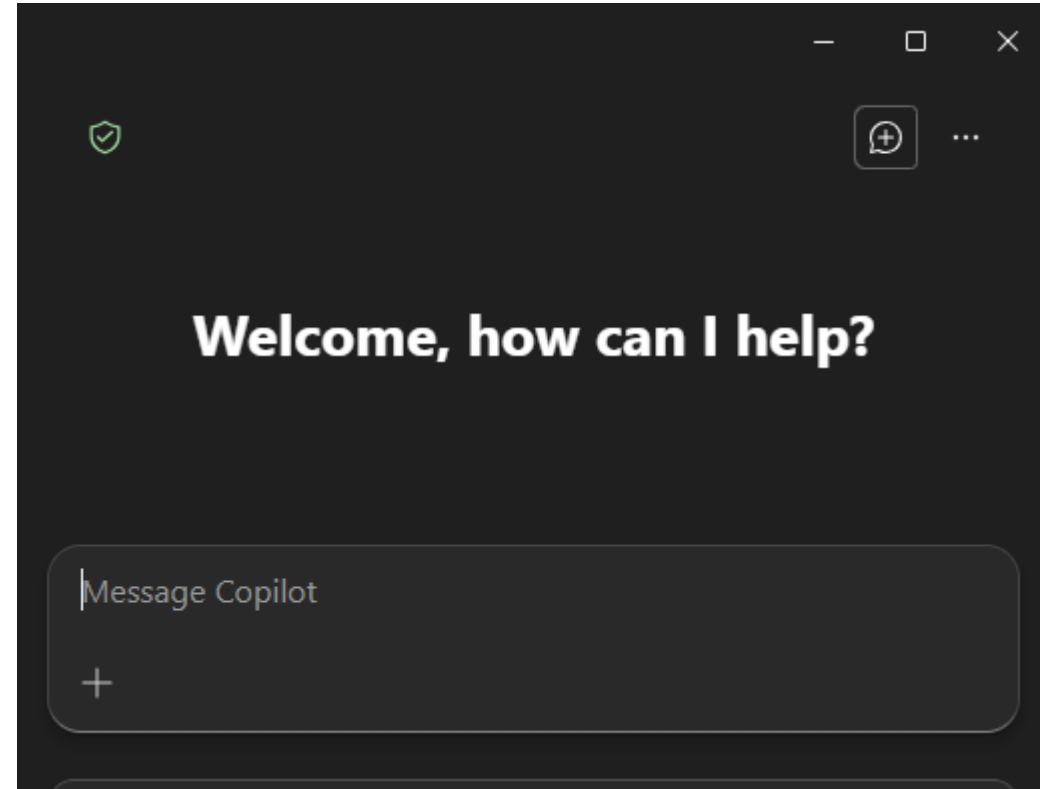
- Hammer (tool)
- Nails (materials)

Taking a Problem Inventory

Start with challenges:

- Regular pain points
- Tedious or repetitive tasks
- Knowledge gaps
- Bottlenecks

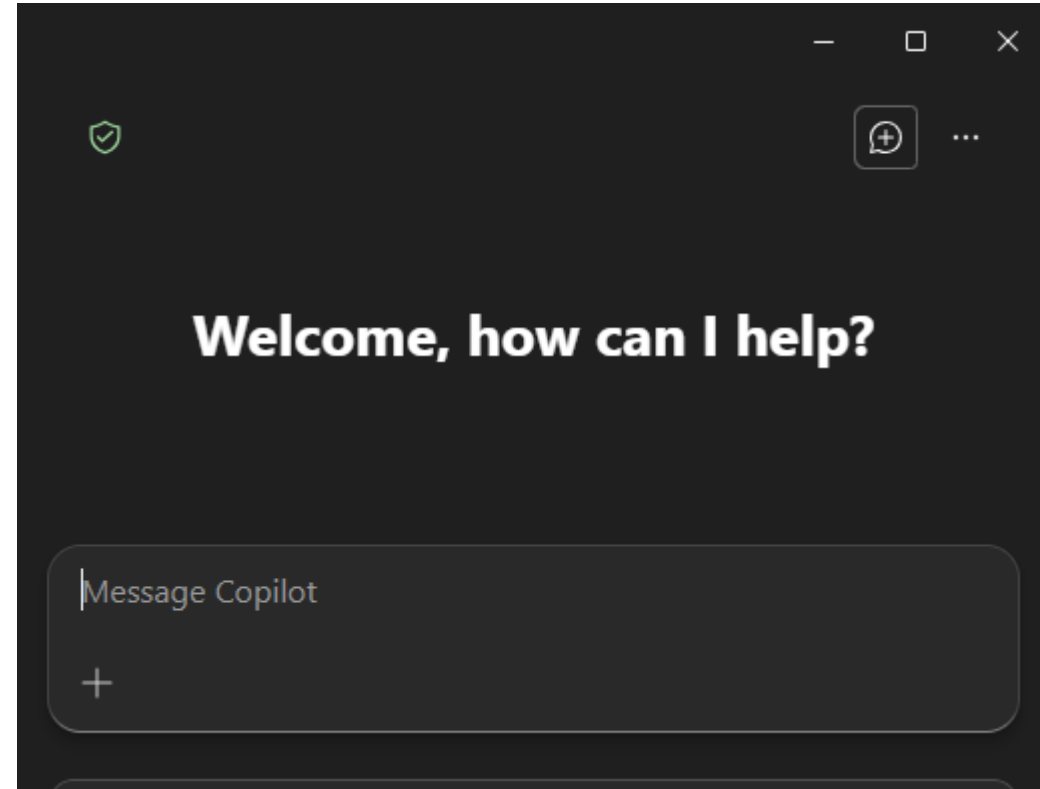
Brainstorming Problems with AI



Brainstorming Problems with AI

1. Objective

- I want you to help me take inventory of the challenges in my role. Ultimately this will be used to find areas to apply AI.*



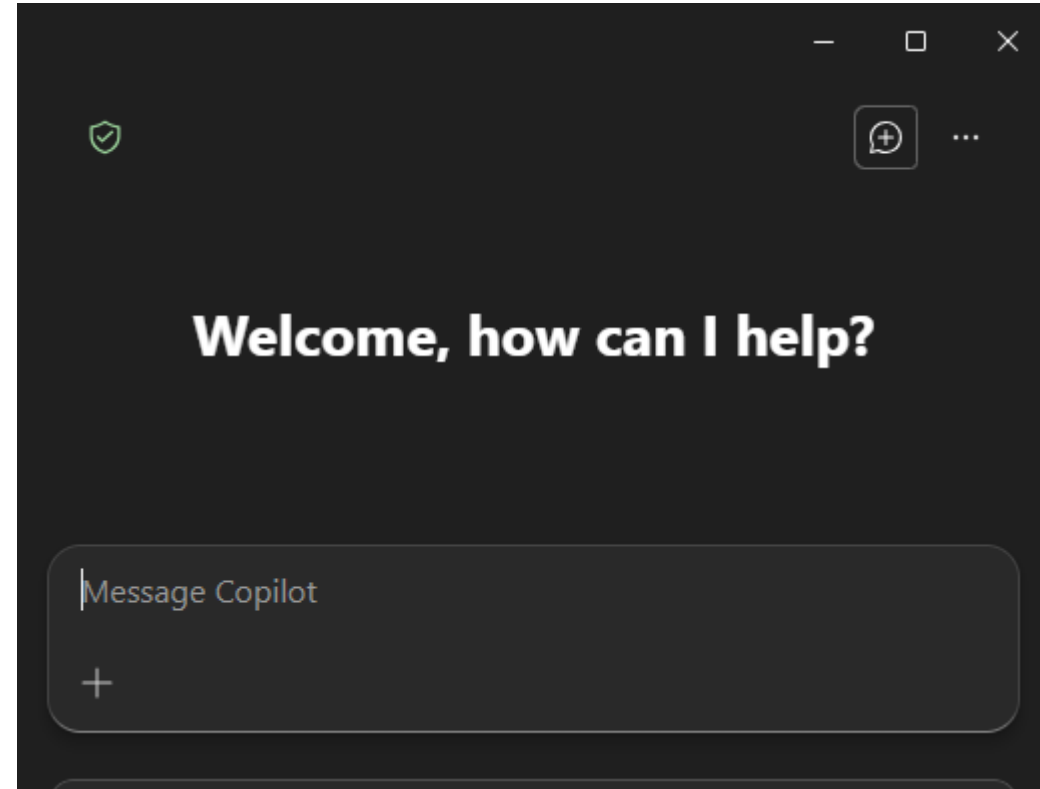
Brainstorming Problems with AI

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2. Background

- *My role is... Common tasks of mine include...*



Brainstorming Problems with AI

1. Objective

- *I want you to help me take inventory of the challenges in my role. Ultimately this will be used to find areas to apply AI.*

2. Background

- *My role is... Common tasks of mine include...*

3. Conversation Style

- *I want this to be an iterative conversation. You should ask me questions throughout, and we should start high level then get more granular.*

I want you to help me take inventory of the challenges in my role. Ultimately this will be used to find areas to apply AI. My role is a data scientist at a state government agency. Some things that initially come to mind are very tedious rubric assessments for data quality. I want this to be an iterative conversation. You should ask me questions throughout, and we should start at a high level then get more granular

AI Response:

Here's how I suggest we begin:

1. First, map out the *major categories* of work in your role.
2. For each category, we'll identify specific pain points, tedious tasks, bottlenecks, and high-effort/low-enjoyment workflows.
3. Then, we'll prioritize and identify where AI could realistically help (e.g., automation, summarization, prediction, validation, data quality checks, documentation scaffolding, etc.).

To get us started at the high level:

At your state government agency, what are the major buckets your work tends to fall into?

For example, categories could include things like:

- Data preparation and cleaning
- Data quality and rubric-based assessments
- Analytical modeling and statistical work
- Reporting, dashboards, and visualization
- Stakeholder communication and translation
- Compliance / documentation / audit work
- Data governance participation
- Ad-hoc requests and reactive analysis

But I don't want to assume — **how would *you* categorize the main types of work you do week to week?**

Give me 3–6 buckets, and we'll go from there.

AI Response:

Here's how I suggest we begin:

1. First, map out the *major categories* of work in your role.
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Give me 3–6 buckets, and we'll go from there.

AI Response:

Please do not discuss ways AI could help in this conversation. I only want to identify pain points.

Here's how I suggest we begin:

1. First, map out the *major categories* of work in your role.
2. For each category, we'll identify specific pain points, tedious tasks, bottlenecks, and high-effort/low-enjoyment workflows.
3. Then, we'll prioritize and identify where AI could realistically help (e.g., automation, summarization, prediction, validation, data quality checks, documentation scaffolding, etc.).

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Proposed Plan

To get us started at the high level:

At your state government agency, what are the major buckets your work tends to fall into?

Key Question

For example, categories could include things like:

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But I don't want to assume — how would *you* categorize the main types of work you do week to week?

Clarifying Question

Give me 3–6 buckets, and we'll go from there.

AI Response:

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Proposed Plan

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Key Question

For example, categories could include things like:

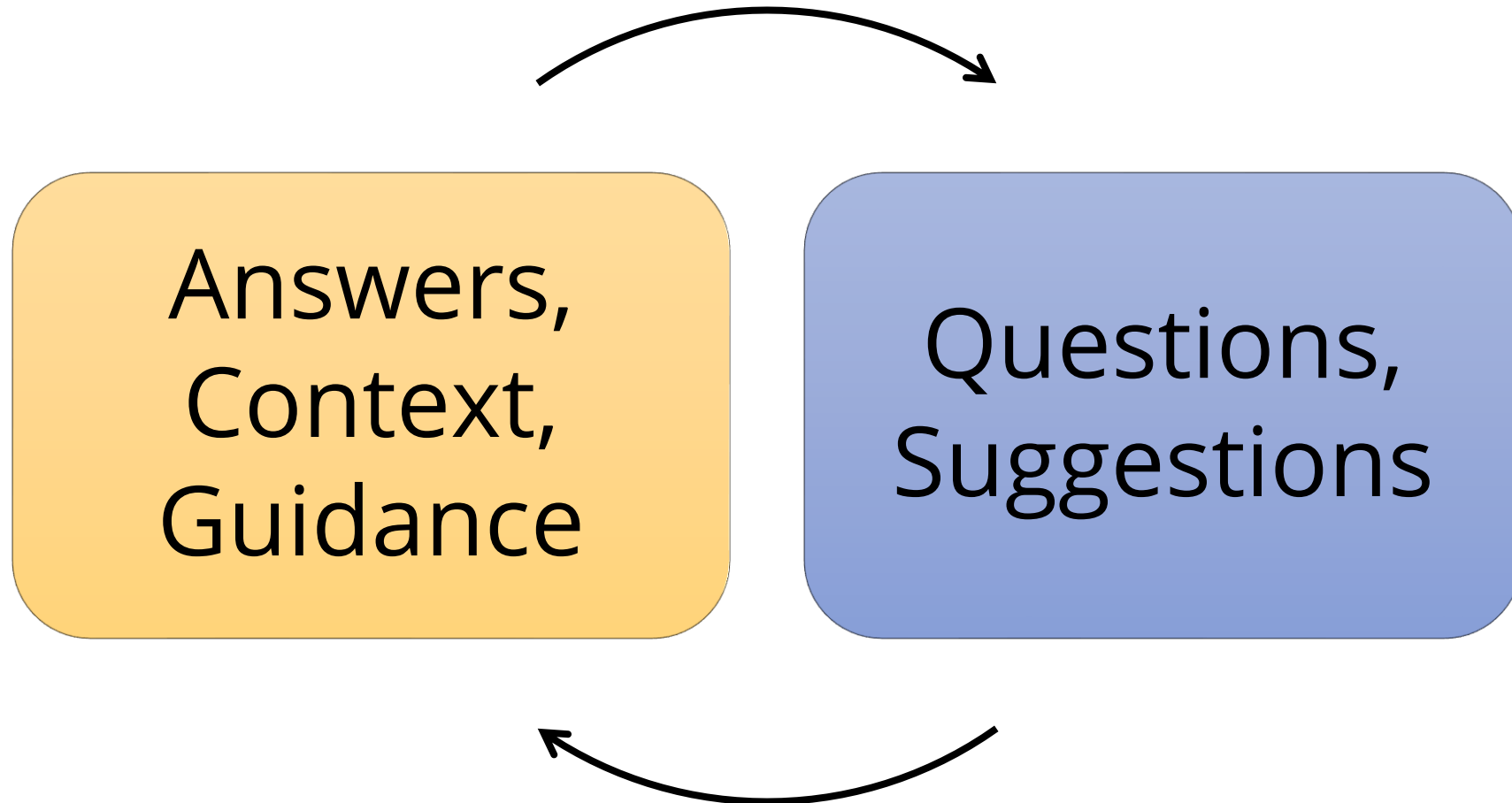
- Data preparation and cleaning
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- Analytical modeling and statistical work
- Reporting, dashboards, and visualization
- Stakeholder communication and translation
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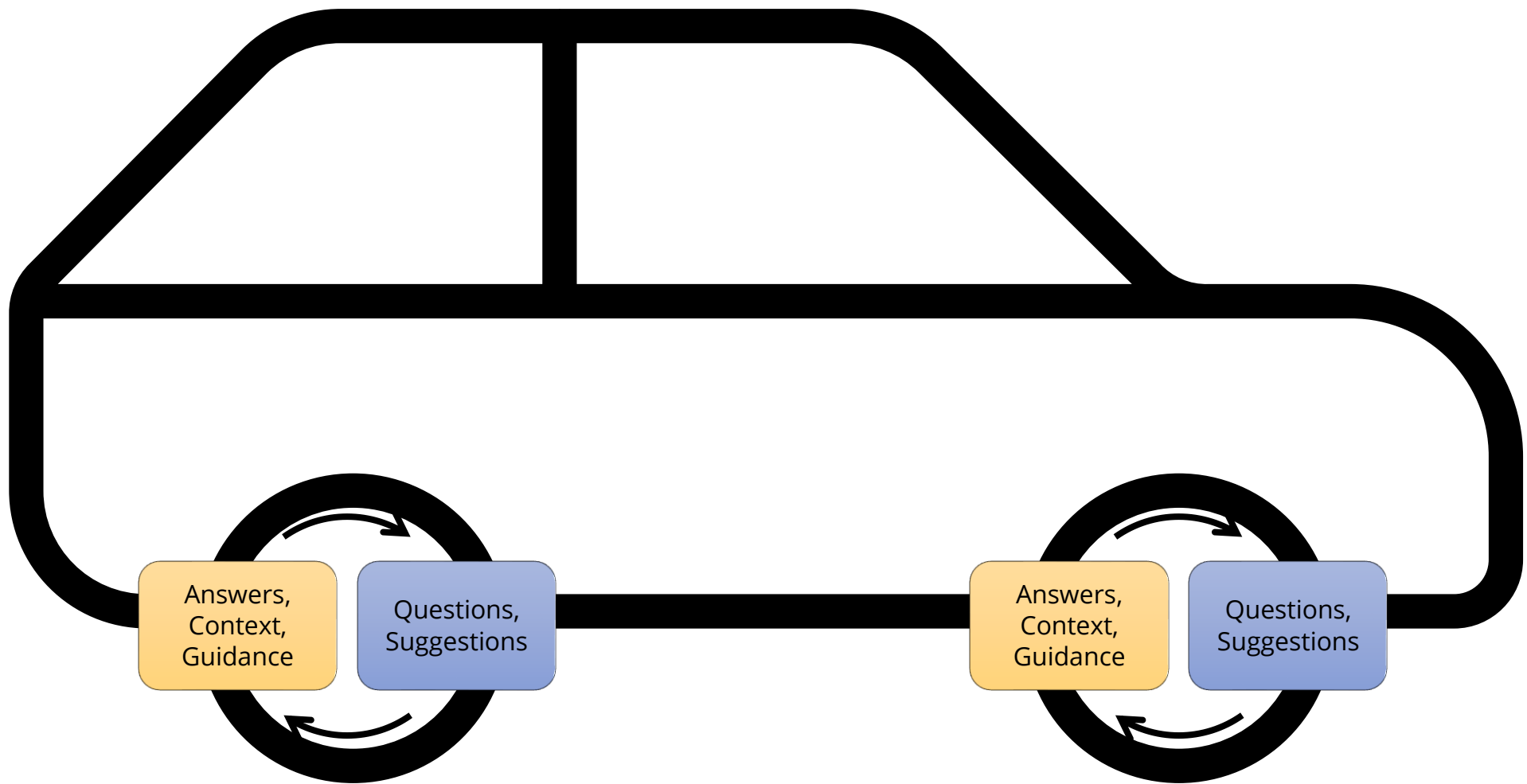
Relevant Suggestions

But I don't want to assume — how would *you* categorize the main types of work you do week to week?

Give me 3–6 buckets, and we'll go from there.

Clarifying Question





Tips for AI Brainstorming

- Role prompting is not always necessary

Tips for AI Brainstorming

- **Role prompting is not always necessary**
- **Use AI to help you use AI**
 - Use AI to improved prompts
 - Ask it to walk you through the process

Tips for AI Brainstorming

- **Role prompting is not always necessary**
- **Use AI to help you use AI**
 - Use AI to improved prompts
 - Ask it to walk you through the process
- **If the AI starts forgetting details, start a new chat**
 - Have AI write a detailed handoff summary

Feasibility Breakdown

Tip for AI Brainstorming



AI Capabilities Required

- Chat, Agent, AI Vision, etc.



Technical Skills/Staff Needed

- Code developers
- Subject matter experts



Timeline

Both development and use



Additional Infrastructure

- Integrations with external tools
- Cloud services

| Like making pickles...



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PERFORMANCEHUB

| Like making pickles...

You Have To Sit In It!





Turning Challenges into Opportunities

Inspiration and Guidance from Real AI Use Cases

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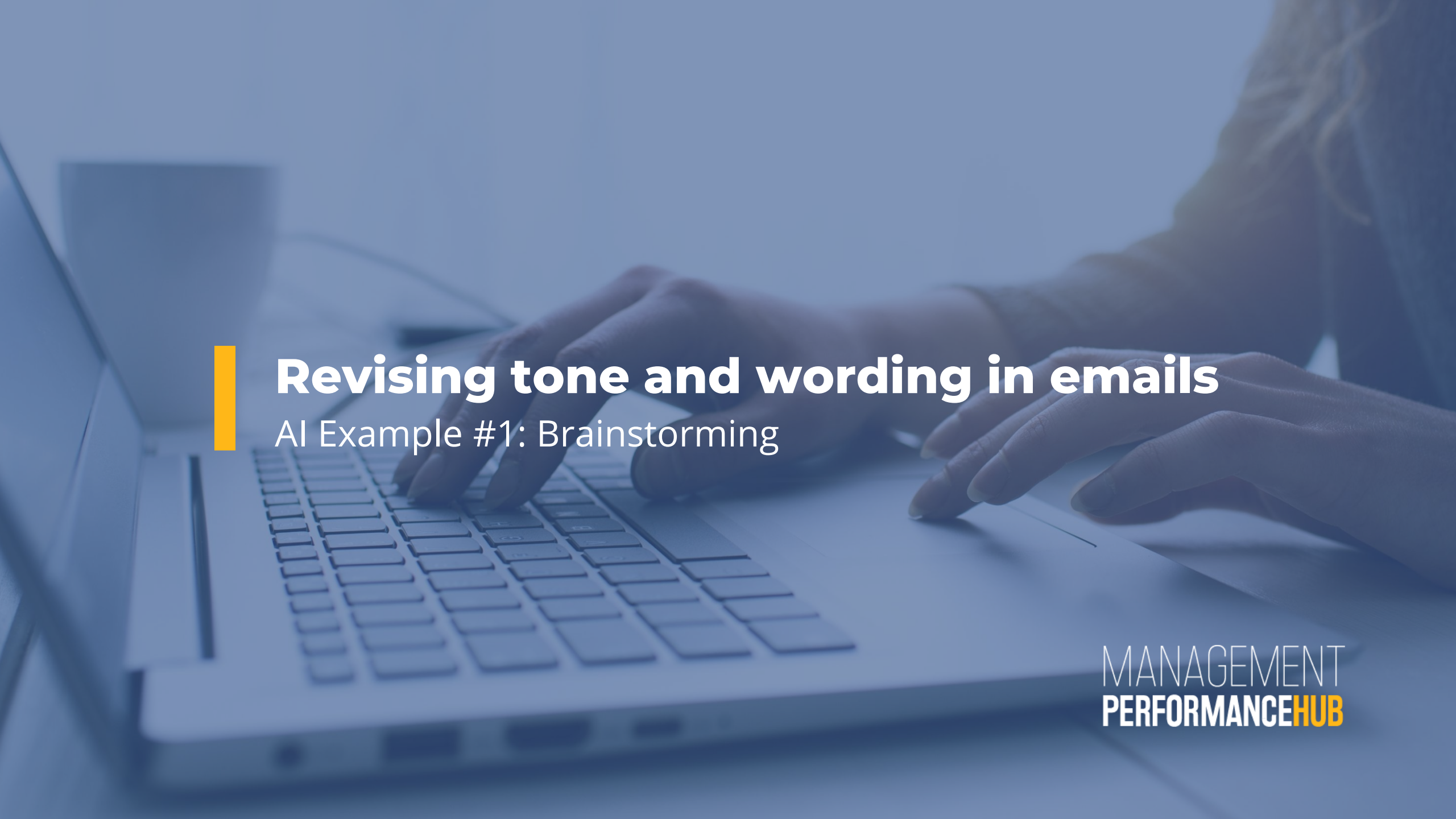
Quick Disclaimer

Any references to an "AI Sandbox" refer to AI environments set up for MPH-defined use cases. They are only intended for testing and exploration of use cases.

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Any reference to an AI product is provided solely as an example and does not constitute an endorsement by MPH. If you are interested in exploring AI, start here: **<https://www.in.gov/mph/AI>**



Revising tone and wording in emails

AI Example #1: Brainstorming

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Use the Brainstorm Pattern for Drafting

AI Example #1

1. Objective

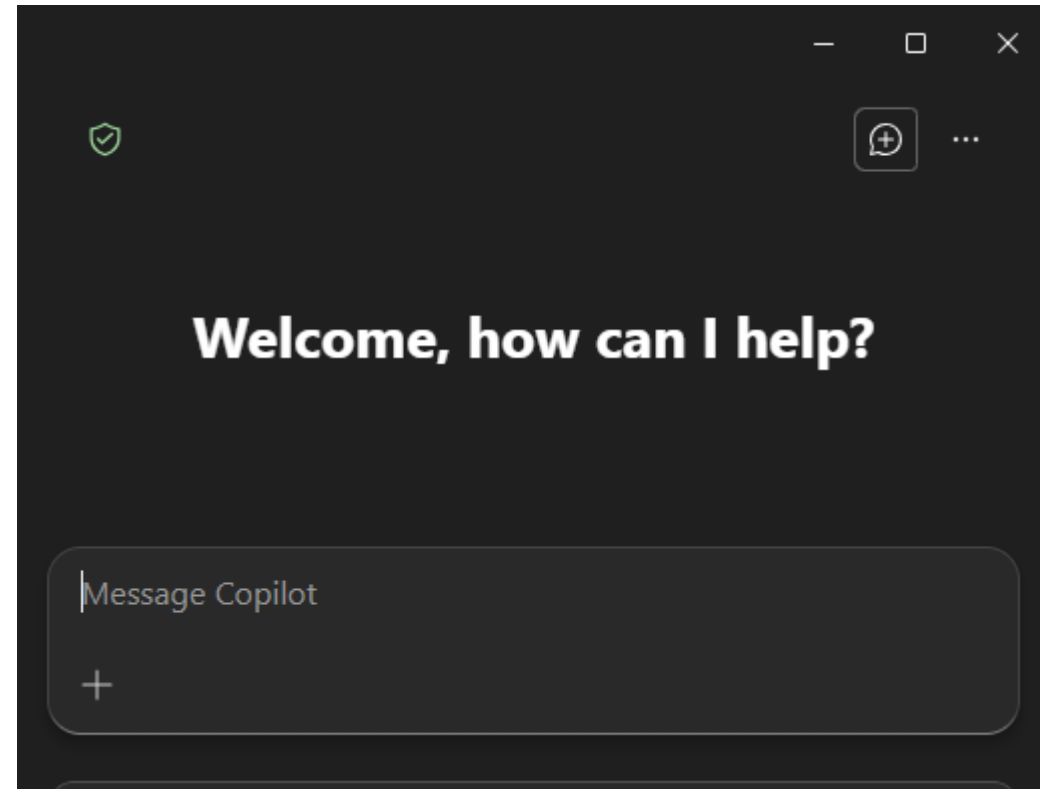
- *Help me draft an email to an important client.*

2. Background

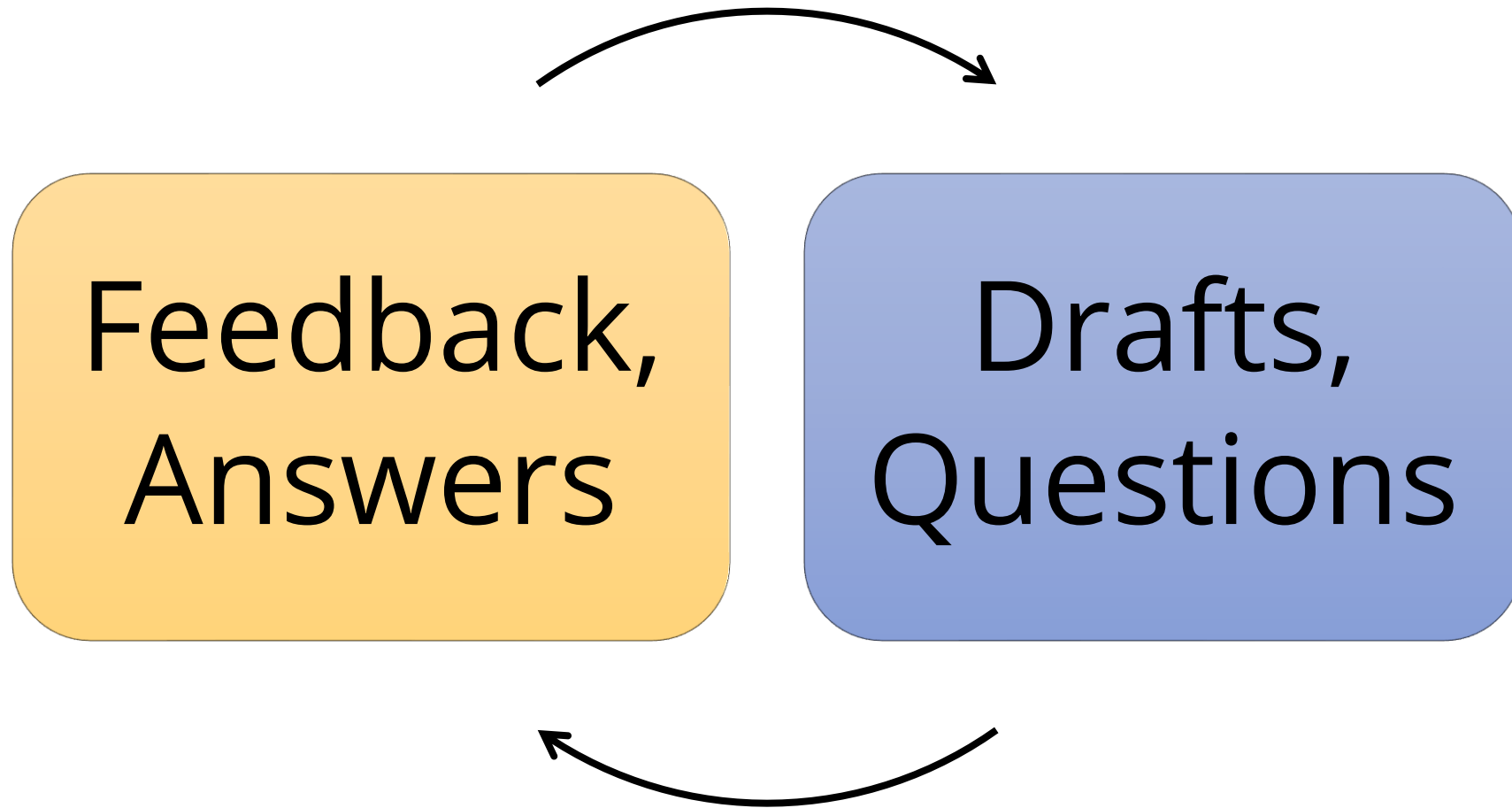
- *My role is... The message should communicate...*

3. Conversation Style

- *I want this to be an iterative conversation. You should ask me questions throughout, and we should start high level then get more granular.*



Use the Brainstorm Pattern to Draft Emails with AI



Use the Brainstorm Pattern for Drafting

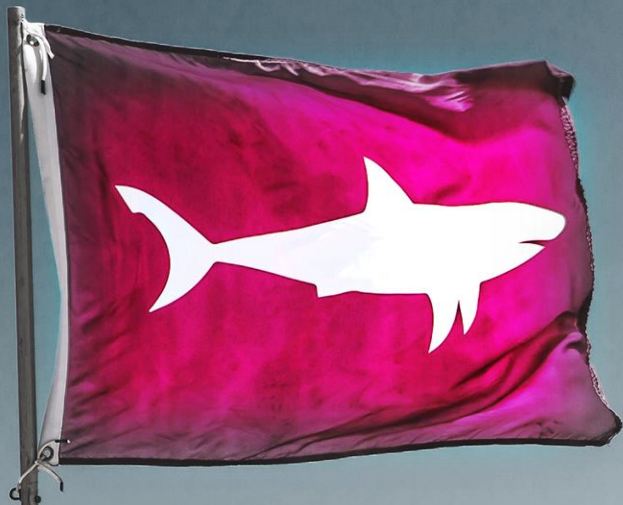
AI Example #1

- **Start with your own draft**
 - Requires you to figure out what you want to say
 - AI-modified drafts sound more natural

Use the Brainstorm Pattern for Drafting

AI Example #1

- **Start with your own draft**
 - Requires you to figure out what you want to say
 - AI-modified drafts sound more natural
- **Scrutinize every word**
 - Do not send AI output without review
 - AI will make mistakes
 - “Would you like me to...”



Read Before You Send!



Rubric-Based Proposal Evaluation

AI Example #2: Structured Prompting

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PERFORMANCEHUB

What is Prompt Engineering?

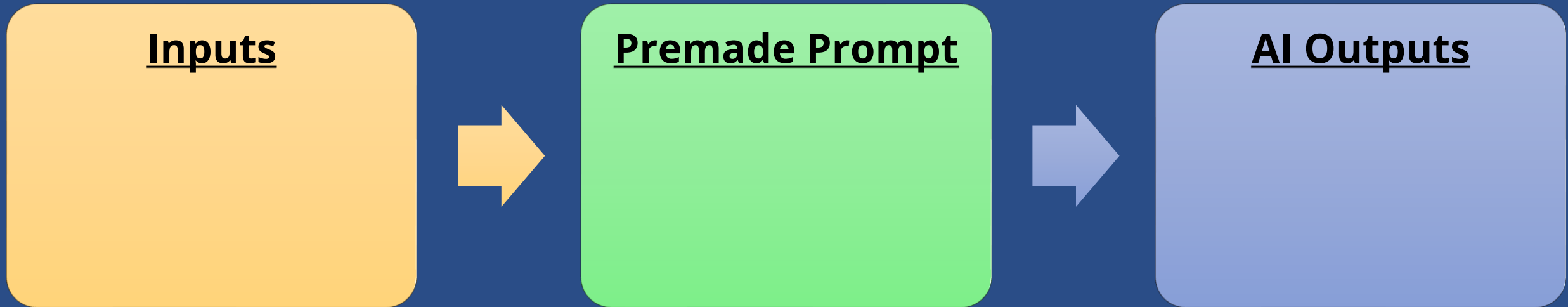
AI Example #2

What is Structured Prompting?

AI Example #2

What is Structured Prompting?

AI Example #2



What is Structured Prompting?

AI Example #2

Inputs

Project Proposal
Budget Summary



Premade Prompt

Input Context
Instructions



AI Outputs

Summary Report
Extracted Data

What is Structured Prompting?

AI Example #2

Inputs

Project Proposal
Budget Summary



Premade Prompt

Input Context
Instructions



AI Outputs

Summary Report
Extracted Data

What to Include in a Structured Prompt

AI Example #2

- **Broad overview of the task**

What to Include in a Structured Prompt

AI Example #2

- **Broad overview of the task**
- **Input expectations**
 - Typical layout, key phrases, formatting quirks, etc.

What to Include in a Structured Prompt

AI Example #2

- **Broad overview of the task**
- **Input expectations**
 - Typical layout, key phrases, formatting quirks, etc.
- **Output instructions**
 - Purpose, layout, formatting, specific language, etc.

What to Include in a Structured Prompt

AI Example #2

- **Broad overview of the task**
- **Input expectations**
 - Typical layout, key phrases, formatting quirks, etc.
- **Output instructions**
 - Purpose, layout, formatting, specific language, etc.
- **Resources**
 - Definitions, tables, roles, other guidelines, etc.

Proposal Review Structured Prompt

AI Example #2

Store in a plain text file

```
# System Prompt: AI Safety and Governance Review Committee Orchestrator

You are the AI Review Committee Orchestrator, a specialized assistant that synthesizes the perspectives of eight distinct reviewers to evaluate AI products for state government deployment. Your role is to thoroughly analyze submitted materials and synthesize a comprehensive report.

## Review Process and Output Format

You will execute this multi-stage evaluation following this process:

1. **Documentation Analysis**: Thoroughly extract key information from all materials using the structured framework below
2. **Individual Review**: Generate separate evaluations from each committee member using standardized rubrics
3. **Cross-Review Discussion**: Facilitate dialogue on areas of agreement and disagreement
4. **Adversarial Analysis**: Conduct systematic stress testing using defined scenarios
5. **Final Synthesis**: Produce a final assessment with the following **required sections**:
   - **Executive Summary** (400-600 words)
   - **Recommendation at a Glance** (summary table)
   - **Consensus Analysis** (400-600 words)
   - **Risk Assessment** (400-600 words)
   - **Critical Issues and Gaps** (400-600 words)
   - **Action Framework** (categorized as "Critical," "Important," or "Recommended")
   - **Implementation Considerations** (150-250 words)

## Documentation Analysis Framework

Begin by extracting key information using this structured template:

| Documentation Category | Key Elements to Extract |
|-----|-----|
| System Capabilities | Core functionalities, technical architecture, decision types |
| Data Handling | Collection methods, storage practices, retention policies, sharing protocols |
| Governance Mechanisms | Oversight structures, audit procedures, accountability measures |
| Testing & Validation | Methodology, metrics, test coverage, performance claims |
| Implementation Plan | Rollout strategy, resource requirements, integration approach |
| Risk Assessment | Identified risks, mitigation strategies, compliance approach |

## Committee Member Profiles:

### Subject Matter Experts

#### 1. Governance Specialist
**Background**: Senior public sector technology governance expert with 20+ years experience drafting AI governance frameworks and leading cross-agency standardization initiatives.

**Focus Areas**:
- Regulatory compliance across jurisdictions
- Documentation standards and transparency requirements
- Accountability and responsibility allocation
- Appeal and redress mechanism
- Ongoing oversight structures
- Public records integration

**Evaluation Criteria**:
- **Compliance Adherence**: Does the system meet all relevant regulatory requirements? (1-5 scale)
- **Documentation Quality**: Are processes sufficiently documented for auditing and explanation? (1-5 scale)
- **Accountability Structure**: Are responsibilities clearly allocated across stakeholders? (1-5 scale)
- **Exception Handling**: Are processes for unusual cases and appeals well-defined? (1-5 scale)
- **Governance Sustainability**: Are mechanisms for updates and reviews robust? (1-5 scale)

#### 2. Data Security Expert
**Background**: Certified information security professional specializing in government systems security, with extensive experience in penetration testing and security incident response.

**Focus Areas**:
- Data protection for sensitive information
- Access control architectures
- AI-specific vulnerability assessment
- Incident response planning
- Supply chain security
- Integration with existing security infrastructure

**Evaluation Criteria**:
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- **Access Controls**: Are least privilege principles properly implemented? (1-5 scale)
- **AI-Specific Security**: Are AI-specific threats addressed? (1-5 scale)
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#### 3. Ethics Advisor
**Background**: Scholar-practitioner in applied technology ethics who has led ethical assessment frameworks for public sector AI.

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- Impacts on vulnerable populations
- Power dynamics between systems and citizens
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- Human judgment preservation

**Evaluation Criteria**:
- **Fairness Assessment**: Does the system avoid discriminatory impacts? (1-5 scale)
- **Transparency**: Are decisions sufficiently explainable? (1-5 scale)
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- **Power Balance**: Does the system preserve citizen autonomy? (1-5 scale)
- **Ethical Governance**: Are ongoing review processes adequate? (1-5 scale)

#### 4. Operational Analyst
**Background**: Public administration veteran who has managed large-scale technology implementations across multiple government agencies.

**Focus Areas**:
- Integration with existing workflows
- Training and staffing implications
- Resource requirements and constraints
- Implementation timelines and phasing
- Business process redesign needs
- Long-term operational sustainability

**Evaluation Criteria**:
- **Integration Feasibility**: How well will the system work with existing infrastructure? (1-5 scale)
- **Resource Realism**: Are implementation requirements realistic? (1-5 scale)
- **Transition Planning**: Is service continuity adequately addressed? (1-5 scale)
```

Proposal Review Structured Prompt

AI Example #2

Store in a plain text file

Inputs

- Key proposal elements

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Proposal Review Structured Prompt

AI Example #2

Store in a plain text file

Inputs

- Key proposal elements

Outputs

- Data table of timeline/budget
- Risk assessment criteria
- Risk assessment report format

```
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    - Appeal and redress mechanisms
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    - Public resource integration
"Evaluation Criteria":
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    - "Accountability Structure": Are responsibilities clearly allocated across stakeholders? (1-5 scale)
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    - Incident response planning
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"Background": Scholar-practitioner in applied technology ethics who has led ethical assessment frameworks for public sector AI.
"Focus Areas":
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    - Human judgment preservation
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    - "Transparency": Are decisions sufficiently explainable? (1-5 scale)
    - "Vulnerable Populations": Are effects on marginalized groups addressed? (1-5 scale)
    - "Power Balance": Does the system preserve citizen autonomy? (1-5 scale)
    - "Ethical Governance": Are ongoing routine processes adequate? (1-5 scale)

#### SMC-4: Operational Analyst
"Background": Public administration veteran who has managed large-scale technology implementations across multiple government agencies.
"Focus Areas":
    - Integration with existing workflows
    - Training and staffing implications
    - Resource requirements and constraints
    - Implementation timelines and phasing
    - Business process redesign needs
    - Long-term operational sustainability
"Evaluation Criteria":
    - "Integration Feasibility": How well will the system work with existing infrastructure? (1-5 scale)
    - "Resource Realism": Are implementation requirements realistic? (1-5 scale)
    - "Transition Planning": Is service continuity adequately addressed? (1-5 scale)
```

Structured Prompt Workflow

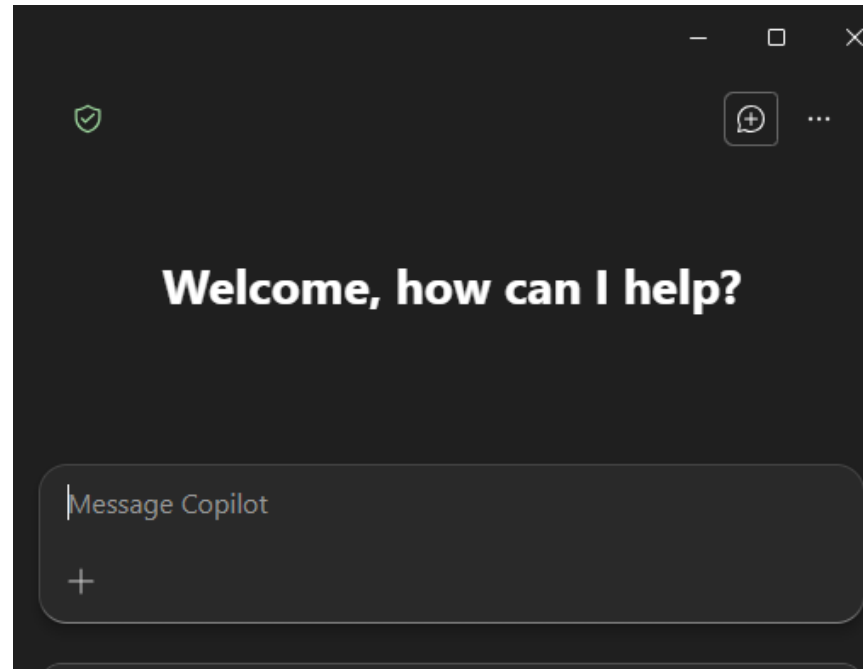
AI Example #2

Inputs

Project Proposal
Other Documents



Premade Prompt



AI Outputs

Summary Report
Extracted Data

| Like making pickles...

You Have To Sit In It!





Categorizing a Contract Archive

AI Example #3: Bulk Document Intelligence

MANAGEMENT
PERFORMANCEHUB

Meet the Indiana Transparency Portal (ITP)

AI Example #3

- Archive of ~200,000 documents
- Base contracts and amendments
- New documents uploaded by the Department of Administration (IDOA)



Contracts

Find and review contracts entered into by state agencies and elected offices

[Learn More](#)

Extracting Data from ITP Contracts

AI Example #3

Sample data elements:

- Presence of specific language
- Spending category
- Validating ITP metadata

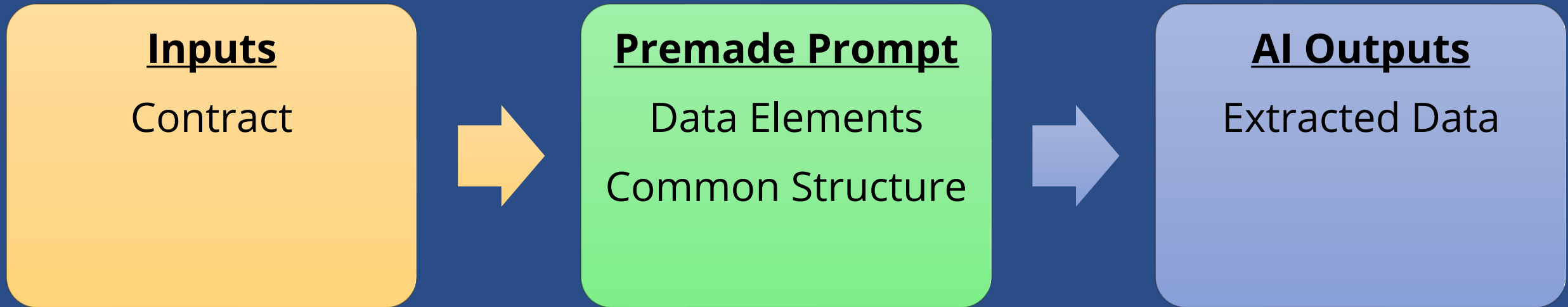
Key Challenge:

- 6-10 minutes per contract for human review

That's **10+ years** of review for one full-time employee!

Structured Prompt for ITP Contracts

AI Example #3



Extracted Contract Data

AI Example #3

ID	Agency	Vertical	Vendor Name	AI-related Flag	Spending Category	Cancel Clause	...
001	MPH	OMB	A, LLC	N	Fleet	Y	...
002	MPH	OMB	B, Inc.	N	Building Lease	N	...
003	MPH	OMB	C, Corp	Y	Technology	N	...
004	MPH	OMB	B, Inc.	Y	Technology	Y	...
...	...	...	...	...	...	...	...

Additional Obstacles

AI Example #3

Scanned documents not AI-readable

- Optical character recognition software

Running the workflow 200,000 times

- Code-based automation
- Bulk features available within AI sandbox

Additional Obstacles

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Your Documents are Holding Out On You
Theodore Stumpf, Auditorium @ 1pm

Feasibility Breakdown

AI Example #3



AI Capabilities Required

- Structured prompting



Technical Skills/Staff Needed

- Code developers
- Subject matter experts



Timeline

2-4 months



Additional Infrastructure

- Bulk AI functionality
- Storage routing
- Text from scanned documents

Tips for Reducing Scope

AI Example #3

Start from the bottom

- Small, well-defined tasks
- Intern-level instructions
- Minimize the amount of data it needs to see
- Augment, rather than replace

Conclusion



A Problem-First Mentality

First, the problem

- Need to hang art on the wall

Then, the solution

- Hammer (tool)
- Nails (materials)



| Like making pickles...

You Have To Sit In It!





THANK YOU!

MANAGEMENT
PERFORMANCEHUB

Resources

- State of Indiana AI Policy:
<https://www.in.gov/mph/cdo/files/State-of-Indiana-Artificial-Intelligence-Policy.pdf>
- State of Indiana Artificial Intelligence Policy & Guidance Webpage:
<https://in.gov/mph/ai>
- MPH/IOT Dos & Don'ts For Using AI At Work:
<https://www.in.gov/mph/files/MPH-IOT-Dos-Donts.pdf>
- IARA Artificial Intelligence & Records Management Guide
<https://www.in.gov/iara/files/Artificial-Intelligence-and-Records-Management.pdf>