

Champion kit

Prompting with Purpose / Talking points, safe demonstrations, and office hours.

Your role: help people practice the four habits. You are a coach, not a policy exception desk.

01 / A short opening you can use

"The assistant can help you draft, summarize, and rewrite. It can also invent facts. You bring the judgment. This course gives you four habits: Protect, Prompt, Probe, and Polish. Start with one permitted task, keep the Prompt Check nearby, and ask for help when a boundary is unclear."

02 / Keep the four habits consistent

Protect: keep customer identifiers, employee and HR details, and confidential business information out. Removing a name alone may not make a record safe.

Prompt: include Role + Context + Task + Format; use a follow-up to clarify what missed.

Probe: verify rates, fees, dates, names, and policy references against approved sources. Notice tone and missing context.

Polish: make an accurate draft fit its audience. The person sharing it owns the final message.

03 / Run a safe demonstration

Use the organization's approved assistant only after access and rules are confirmed. Use synthetic or public material that is permitted for this exercise. Never ask someone to paste a customer record, performance review, completed application, confidential document, or screenshot containing restricted details. Use a prepared synthetic example if a participant's material is unclear.

04 / A prompt to practice

Role: You are a workplace learning facilitator.

Context: A fictional team is learning four habits for using an AI assistant: Protect, Prompt, Probe, Polish.

Task: Draft an invitation to a practice session.

Format: Under 100 words, warm and plain. Do not invent a date, location, tool name, or policy. Ask readers to bring a general task description, not private records.

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Harborline Financial is fictional. This kit is an independent concept, not bank policy. A real rollout requires approval of tool use, data rules, reference sources, and internal support routes. No measured results are claimed.

Office hours that help

Suggested format / A 30-minute session for one useful task.

Before the session

The rollout owner confirms the internal help route and responsible policy contacts. Publish the approved time and location, course link, and job-aid link. Invite general questions and synthetic examples. Remind participants not to bring restricted records into the assistant, shared screen, meeting chat, or champion notes. Do not record the session by default.

0-5 minutes / Set the boundaries

Name the four habits. Explain that champions coach practice but do not authorize data exceptions. Ask each participant to describe a task in general terms. If the task depends on restricted material or an unconfirmed permission, pause it and use the prepared example instead.

5-15 minutes / Prompt and improve

Use the sample invitation prompt or another confirmed low-risk task. Ask: Who is the audience? What should the assistant do? What form should the answer take? Try one follow-up, such as "Make it plainer and remove any invented details." Invite participants to explain what improved.

15-25 minutes / Probe and polish

Identify every factual claim in the draft. Check against an approved source or remove unsupported specifics. Ask whether the tone fits and what context is missing. Edit the message yourself. Show that polished wording does not make an unverified claim trustworthy.

25-30 minutes / Leave with a next step

Ask each participant to name one permitted task they will try, one check they will make, and where they will seek help. Point to the Prompt Check. Log only general friction and the agreed follow-up; route unresolved permission or policy questions to the accountable owner.

Suggested support rhythm

Offer an initial session in launch week and a follow-up during the next week, adjusted to demand and staffing. Review general questions with the rollout owner after each session. Share an approved clarification if a pattern recurs. Confirm actual dates and named contacts internally before inviting employees.

If private data appears: stop the demo and avoid repeating or copying it. Follow the organization's established incident process; do not investigate or invent a remedy yourself.

Answer, route, follow up

A practical reference / Use the course habits without guessing policy.

"Can I paste this customer message?"

"Keep customer-identifying information out. Describe the situation in general terms only if the task and inputs are permitted. If you are unsure, pause and use the approved internal help route."

"The answer looks right. Can I send it?"

"Not yet. Check every specific claim against an approved source, remove what you cannot verify, and polish the tone and context. You own what you send."

"Can I summarize a performance review?"

"Keep it out. Performance reviews are private HR material, even when names are removed. I can demonstrate summarization with a synthetic example instead."

"The result is generic. Is the tool broken?"

"Try a clearer role, context, task, and format. Reply with what missed. Better prompting can improve relevance; it does not replace verification."

Capture friction without collecting private data

For each general question, record the date, task category, habit involved, friction observed, follow-up owner by role, next action, and status. Do not record names of customers, HR details, account numbers, raw prompts, private outputs, or screenshots of sensitive work.

Example log entry (synthetic): Launch week / draft invitation / Prompt / output invented a meeting date / champion / demonstrate a "do not invent details" instruction and verify the next draft / resolved.

Escalation and follow-through

Tool access: use the confirmed internal technical support route.

Data, permissions, or policy: ask the accountable security, privacy, or policy owner before proceeding.

Possible exposure: follow the established incident process immediately.

Learning friction: share a general pattern with the rollout owner for a guidance or practice update. Close the loop with approved advice; do not create unofficial policy.

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Suggested formats and timings are design proposals. They are not evidence of a completed launch, actual staff participation, or measured adoption.