

Prompting with Purpose

Rollout brief / Audience, adoption risks, and a practical launch plan.

AI drafts. You decide. Protect what goes in, shape the prompt, check what comes out, and own what you send.

01 / The audience and the change

For non-technical employees at Harborline Financial, a fictional bank introducing an AI assistant. Branch service staff, operational teams, and people managers need safe ways to draft, summarize, and rewrite everyday work. The concept assumes an approved work assistant; access and permitted uses must be confirmed before a real launch.

02 / The performance goal

After the 25-minute Rise 360 course, employees should be able to reject restricted inputs, write a prompt with Role + Context + Task + Format, verify specific claims against approved sources, and edit an accurate draft for its audience before sharing it.

03 / The adoption risks and the response

Unsafe inputs: practice sorting customer information, HR material, and confidential business data out of prompts.

Confident errors: use Maya's flawed rates-and-policy draft to practice checking facts.

Generic output: model a clear prompt and a useful follow-up.

One try, then abandonment: connect the course to one low-risk task and offer champion support.

Policy uncertainty: route unclear cases to the accountable internal owner; champions do not approve exceptions.

04 / One concept, a complete package

I pair the course with the one-page Prompt Check, the "Don't paste that" launch ad, and a champion kit with talking points, office-hours guidance, and a follow-up log. All four habits stay consistent across the materials.

[Take the course](#) | [Open the Prompt Check job aid](#) | [Watch the launch ad](#)

Harborline Financial is fictional. This independent portfolio concept was not commissioned by a bank. Activities and evaluation measures are proposed; no client affiliation or measured results are claimed.

From rollout to routine

Suggested sequence / Relative timing, subject to internal approval.

Before launch / Make safe practice possible

The rollout owner confirms access, allowed inputs, approved reference sources, and escalation routes with the responsible security, privacy, and policy owners. Managers identify a low-risk task for practice and protect time for the course. Champions rehearse with synthetic or public material only. Do not launch practice until these checks are complete.

Launch week / One clear invitation

Share the launch ad and a short manager message: take Prompting with Purpose, keep the Prompt Check handy, then try one permitted task. Link directly to the course and job aid. Offer office hours for prompt practice and verification questions; publish the real times and internal help route only after they are confirmed.

First two weeks / Practice with support

Champions host short sessions using the kit. Each employee brings a task description, not raw customer or personnel records. Practice one prompt, inspect the output, and polish it. Managers ask what worked and what remains unclear. The rollout owner reviews recurring questions and updates guidance through the relevant policy owner.

At 30 and 60 days / Look beyond completion

Proposed checks: course knowledge check and confidence pulse at completion; weekly active use and restricted-data prompt flags at 30 and 60 days, only where authorized telemetry exists. Establish a baseline and agree success criteria before launch. Review aggregated patterns with the relevant owners, without copying restricted prompt contents into champion logs. No numerical adoption target or result is assumed.

Who owns what

Rollout owner: coordinates launch, communication, and follow-up.

Managers: make time and reinforce safe work habits.

Champions: coach permitted practice and surface recurring friction.

Security, privacy, and policy owners: approve boundaries and resolve risk questions.

Employees: protect inputs, verify claims, and own what they send.

Ready to launch? Access works. Boundaries are clear. Reference sources are available. Managers have made time. Champions know where to escalate.