Session 2 Handout: Summarizing for Real Readers

FAST-02 Generative AI for Everyday Work · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

"Summarize this" is the most common AI request at work, and the least specified. A good summary is written for a particular reader who must do something afterwards. A trustworthy summary has been checked against the source. This session covers both, using a 30-page safety manual from North Shore Builders (fictional, Beverly).

Key concepts

1. Choose the summary type first

Type	Reader needs	Shape	Example
Brief	Know what it is and why it matters	3 to 5 lines	"The 2026 manual adds a heat rule and weekly ladder inspections."
Decision memo	Choose between options	Options, recommendation, open questions	"Adopt vendor A or B for harness inspections?"
Action list	Do things	Who, what, by when	"Foremen: restock first-aid kits by Friday."

Name the type in the prompt. Without it you get a generic recap that serves nobody.

2. Write for the reader, then set the length

Name the reader (busy owner, new hire, customer, inspector) and what they must do after reading. Then set a hard limit: lines, bullets, or words. Ask for plain language and defined terms. Remember that **shorter summaries need more checking, not less**: to compress, the model must choose, merge, and round, and that is where numbers drift and rules flip.

3. Five-fact verification

The minimum check for any summary someone will rely on:

1. Pick five facts from the summary: numbers, dates, names, rules, deadlines.
2. Find each one in the source and mark the location.
3. Record **match**, **wrong**, or **missing** (stated in the summary but not found in the source).
4. Any wrong or missing fact: fix the summary and recheck.
5. Keep the log. It is your evidence that you checked.

Pick the facts that would cause the most harm if wrong: safety thresholds, deadlines, money.

4. Long files: limits and chunking

Every tool has a limit on how much it reads well. Even with very large context windows, details from the middle of long documents are more likely to be dropped or blended. The reliable approach:

- Split by section (or chapter, or date range).
- Summarize each part, asking "what did you leave out of this section?"
- Combine the section summaries for each reader.
- Check the combined summary against the document's headings: which sections are missing, and is that right for this reader?

Tools that hold documents as sources (NotebookLM, Copilot referencing a file, a Claude or ChatGPT project) help with retrieval and citations, but the coverage and five-fact checks still apply.

Worked example: one manual, two readers

Source facts (fictional NSB manual): hard hats in all active work zones, including the yard; fall protection at 6 feet; ladders 3 feet above landing; incidents reported to supervisor within 1 hour; new heat rule (10-minute break per hour above 90°F heat index); ladder inspections now weekly.

Supervisor brief (decision-oriented, 120 words): leads with what changed from 2025 (heat rule, weekly ladder inspections), what to enforce this week, and open questions (who logs heat breaks?).

New-hire list (plain, 90 words): six exact rules: hard hat everywhere work is active including the yard; harness or guardrail at 6 feet; ladder 3 feet above the landing, never stand on the top step; tell the supervisor within 1 hour of any incident; water, shade, 10-minute break each hour when it's hot; ask if unsure.

Five-fact check (new-hire list, first AI draft):

Fact	Source	Result	Fix
Fall protection at 10 ft	§4: 6 ft	Wrong	Changed to 6 ft
Ladder 3 ft above landing	§5	Match	
Report by end of shift	§7: within 1 hour	Wrong	Changed to 1 hour
Hard hats on site	§2: all active work zones incl. yard	Partly	Tightened wording
Heat break 10 min/hour	§8	Match	

Checklist: summary ready to send

- ☐ Summary type named (brief, decision memo, action list).
- ☐ Reader and their next action named.
- ☐ Hard length set and met.
- ☐ Long file chunked; coverage checked against headings.
- ☐ Five facts checked and logged; errors fixed and rechecked.
- ☐ Same facts across versions for different readers.

Do and don't

Do	Don't
Name the reader and what they must do	Ask for "a summary" and hope
Check the five highest-harm facts	Check only the first paragraph
Chunk long files and ask what was left out	Paste 30 pages and trust a one-paragraph answer
Keep facts identical across audiences	Let the new-hire version "simplify" a safety number
Log your checks	Rely on memory that you checked

Try this at work

1. Pick a long, non-sensitive document you or your team rely on.
2. Write two summary prompts for two readers. Run them.
3. Do a five-fact check on each and record the result.
4. Share the better one with a coworker and ask what they'd do after reading it. If they can't say, revise.

Glossary

Term	Meaning
Brief	Short "what and why it matters" summary
Decision memo	Summary built around options and a recommendation
Action list	Who does what by when
Five-fact check	Verifying five key facts against the source and logging results
Chunking	Splitting a long document into sections before summarizing
Coverage check	Comparing a summary against headings to find omissions

Key takeaways

- Type and reader first; length second.
- Shorter means more checking.
- Five facts, logged, every time.

This manual and its rules are fictional training material and are not OSHA requirements. Check current federal and state rules for real worksites.