Session 3 Handout: Documents and Slides

FAST-04 AI Productivity with Microsoft Copilot and Google Gemini · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

Assistants can turn an outline into a draft and a draft into a deck in minutes. The risk is that a confident document or a polished slide carries a number nobody can trace. This session keeps every claim tied to a source file, from first draft to final slide.

Key concepts

1. Outline → draft with source files

- Start from **your outline**: you decide the structure and the point.
- **Reference the source files** (Word: reference files with / in the prompt; Docs: Gemini side panel with @-referenced files where available).
- Draft **section by section**, not all at once.
- Say **"use only these files"** and ask for a marker like **[NOT IN SOURCE]** for gaps.
- Fill gaps from real people and documents, not the AI.

2. Rewrite for the audience

Same facts, different reader. Rewrites can change length, tone, and reading level, never numbers, dates, names, or commitments. Lock them in the prompt ("keep every number exactly") and compare versions side by side.

3. Draft → deck

Copilot in PowerPoint (create a presentation from a file) and Gemini in Slides (create slides and images) can build a deck from a checked document. Expect:

- **too many slides and too much text**: cut to your target (e.g., six);
- **generic images**: replace with a real chart or table, or remove;
- **new claims**: anything not in the document gets removed.

The deck is only as good as the document behind it. Check the document first.

4. Fact and figure check

List every **number, date, and name** on every slide. Trace each to the source file and location. Check that charts match their tables (do the parts sum to the total?). Remove anything you can't trace. Record it on the check sheet.

Worked example: Q3 service briefing

Sources: Q3_OnTime_Report (450 loads, 27 late, 94.0% on time; Q2 91.0%; Nashua 11 late); Customer_Survey_Summary (communication 4.1/5; tracking 3.6/5; top request proactive delay alerts, 29 mentions).

AI draft problems found: "Industry average is 89%" (not in sources: removed); "best-trained drivers in New England" (unsupported: removed).

Deck problems found: on-time shown as 96% (fixed to 94.0%); a causes chart summing to 30 (source: 12 + 9 + 6 = 27; fixed); stock photo of a sunset highway (replaced with the late-by-route table).

Driver rewrite check: "11 late loads on Nashua" stayed "11," not "about a dozen."

Checklist: document and deck

- ☐ Outline is mine; sources named; "use only" stated.
- ☐ [NOT IN SOURCE] gaps filled by people, not the AI.
- ☐ Rewrites keep every number, date, name.
- ☐ Deck cut to target; text reduced; generic images removed.
- ☐ Every number, date, name on the check sheet with a source.
- ☐ Charts match tables.

Do and don't

Do	Don't
Draft section by section	Ask for "a complete report on..."
Mark gaps explicitly	Let the AI fill gaps with benchmarks
Cut generated slides hard	Shrink fonts to fit everything
Trace every figure	Assume a chart matches its table
Present how you checked	Present "the AI made this"

Try this at work

1. Take a short internal document you write regularly.
2. Draft it from an outline and two non-sensitive files.
3. Generate a deck; cut to five or six slides.
4. Complete a check sheet; count what you removed.

Glossary

Term	Meaning
Grounded draft	A draft limited to named source files
[NOT IN SOURCE]	Marker the AI uses for gaps instead of guessing
Audience rewrite	Same facts, adjusted for a different reader
Check sheet	Record of every slide figure and its source

Term	Meaning
Chart-table match	Confirming the chart's values equal the source table

Key takeaways

- Draft from your outline and your sources only.
- Rewrites change the reader, never the facts.
- Every figure on a slide traces back to a source.