Session 3 Handout: Your Role Playbook

FAST-06 Occupation-Specific AI Role Labs · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

A playbook is only useful if someone else in your role can follow it and get the same safe result. Today you finish ten procedures, have a same-occupation peer follow them cold, fix what breaks, and demonstrate one live. You leave with ten things you can do better tomorrow morning.

Key concepts

1. What makes a procedure usable

- **Specific trigger:** "When a guest emails pre-arrival questions," not "emails."
- **Steps with locations:** "Open Front Desk > FAQ v2026-10," not "use the usual FAQ."
- **The actual prompt:** copy-ready, with placeholders for sanitized input.
- **Concrete check:** what against what, and what to do if it fails.
- **Data rule:** what to strip; what never to use.
- **Honest time:** by hand vs. with AI including checking.
- **Owner and last-tested date.**

2. Peer review in the same occupation

Your peer follows two procedures without asking you anything, then completes W4:

Question	Why
Could you follow each step? Where did you get stuck?	Hidden knowledge
Is the check concrete?	Vague checks fail silently
Is the data rule right for our role?	Peers know the real risks
Is the time realistic?	Keeps the playbook credible

Every question your peer had to ask is a missing instruction.

3. Honest time and the retire list

If checking erases the time saved, or the risk outweighs the benefit, retire the procedure or mark the task "no AI." A playbook with eight solid procedures and two honest retirements is stronger than ten weak ones.

4. The lightning round

Two minutes: name the task, show the sanitized input, run the prompt, **show the check**, and say what you'd fix. The check is the point.

Worked example: peer review fixes

Original	Peer note	Fixed
"Use the usual template"	"Which one? Where?"	"Templates > Appeals > Appeal_Template_v3 (placeholders only)"
"Check it"	"Check what?"	"Every amount matches the variance report; every cause is in my notes"
"Saves an hour"	"Including checking?"	"By hand 20 min; AI 3 + check 6 = 9 min"
"Paste the customer email"	"That includes their phone number"	"Write a sanitized one-line summary first; strip names, contact, order numbers"

Checklist: playbook ready

- ☐ Ten cards (or fewer plus an honest retire list).
- ☐ Every card: trigger, steps with locations, prompt, concrete check, data rule, time, owner.
- ☐ Two cards followed cold by a same-occupation peer.
- ☐ All peer notes resolved.
- ☐ Stored in an approved shared location with a review date.

Do and don't

Do	Don't
Write for a colleague, not yourself	Rely on what's in your head
Show the check in your demo	Show only the output
Retire procedures that don't pay off	Keep them to reach ten
Store the playbook where the team can find it	Keep it in personal chat history
Retest after tool updates	Assume prompts work forever

Try this at work

1. Use three procedures this week; log time and issues.
2. Ask a colleague to follow one cold.
3. Agree with your manager where the team playbook lives.

Glossary

Term	Meaning
Role playbook	Ten procedure cards for one occupation

Term	Meaning
Cold test	A peer follows a procedure without help
Retire list	Procedures dropped, with reasons
Lightning round	Two-minute live demo of one procedure
Last-tested date	When the procedure last worked as written

Key takeaways

- Usable means a same-occupation peer can follow it cold.
- The check is the heart of every procedure.
- Honest time decides what stays.