FAST-06 Lab Guide: Occupation-Specific AI Role Labs

Provider: 7formations | Course: FAST-06 | Instructor: Wadood Chaudhary | Three labs, one per session, drawing on six guided task labs per track (Appendix C) Audience: trainees (steps, worksheets) and instructors (setup, answer notes, timing). Instructor-only notes are marked **Instructor**.

Each cohort is one occupation. All companies, people, records, and figures are fictional. Bookkeeping account numbers are synthetic; healthcare templates use [PATIENT]-style placeholders and never PHI; HR labs never use applicant or employee records. Labs run in the employer's approved tool (Microsoft Copilot, ChatGPT Business or Enterprise, Gemini for Google Workspace, or Claude for Work), the 7formations sandbox, or on paper.

0. Lab environment and safety rules (read before Lab 1)

General rules (read aloud)

- Approved tools only, work accounts only. No personal information (G.L. c. 93H, 201 CMR 17.00), no PHI, no confidential business data.
- Sanitize **before** the prompt. Never ask the AI to remove sensitive data for you; by then it's already in the tool.
- You send it, you own it. Every procedure has a concrete check.

Role-specific data rules (read the line for this cohort)

Track	Fictional company	Never enter	Work from instead
HR and recruiting	North Shore Builders (Beverly, 45 employees)	Applicant resumes, employee records, complaints, medical or leave details	Skills lists, approved handbook excerpts, policy text
Bookkeeping and accounting	Back Bay Accounting Partners (Boston)	Client names with account/card numbers, SSNs/EINs tied to people, bank statements	Category totals, synthetic exports, your own notes
Healthcare front office	Charles River Family Dental (Newton, Waltham)	Any PHI: names, dates of birth, chart notes, insurance IDs, appointment details tied to a person	Generic approved instructions and templates with [PATIENT], [DATE]
Customer service and sales	Cape Harbor Inn (Chatham); Lowell BioSupply (Lowell)	Customer names with contact, card, or order details; purchased contact lists	Approved FAQ, product sheets, public company profiles, sanitized summaries
Project coordination	Bayside Precision Parts (Worcester County)	Customer confidential drawings and pricing, employee performance notes	Your meeting notes (sanitized), project plans, risk templates
Office and administrative support	Merrimack Freight & Logistics (Lowell)	Employee DOB, ID or loyalty numbers, personal addresses, HR files	Trip descriptions, form-letter templates, policy documents

Massachusetts notes for HR: employers with 25+ Massachusetts employees must include a pay range in job postings (G.L. c. 149, §105F, effective October 29, 2025). Training, not legal advice.

Completion

- W1 inventory, W2 procedure cards (×10), W3 sanitization drill (3 of 3 correct), W4 peer review, final playbook and live demo. Meets on every rubric criterion (Appendix B).

Lab 1 (Session 1): Task inventory and first two procedures

Scenario. You know your job better than any AI vendor. Before any prompting, you and your same-occupation peers list where your time actually goes.

Goal. Complete W1 (ten tasks rated for fit and risk) and the first two W2 procedure cards from your track's library (Appendix C).

Data. Your own tasks described in general terms; track library inputs (fictional).

Steps

1. **Inventory (15 min).** List your ten highest-volume tasks (hours per week). Compare with peers; merge similar tasks.
2. **Rate (10 min).** For each: AI fit (good / care / no) and data risk (low / medium / high), with a one-line reason.
3. **Pick (5 min).** Star two good-fit tasks that match the track's guided labs 1 and 2.
4. **Guided labs 1-2 (15 min).** Run them from Appendix C with the fictional inputs.
5. **Card (5 min).** Write a W2 card for each: steps, prompt, check, time, data rule.

Deliverable: W1 Task inventory and risk ranking

#	Task (general)	Hours/week	AI fit	Data risk	Reason	Becomes a procedure?
1-10						

Deliverable: W2 Procedure card (one per task)

Field	Entry
Task and trigger	
Data rule (what to strip; what never to use)	
Steps (numbered; where files live)	
Prompt	
Check (what against what)	
Time: by hand / with AI incl. check	
Owner and last tested	

Completion criteria. Ten tasks with fit, risk, and reasons; two cards complete with concrete checks; instructor marks each lab output Meets or Not yet.

Lab 2 (Session 2): Four procedures and the sanitization drill

Scenario. Now you work through the rest of your track's guided labs and prove you can clean realistic inputs.

Goal. Four more W2 cards (guided labs 3-6) and W3: three realistic inputs sanitized correctly.

Steps

1. **Guided labs 3-6 (45 min).** Run each from Appendix C. Write the card immediately.
2. **Sanitization drill (20 min).** For each of your track's three drill inputs (Appendix C): mark everything to strip, write the sanitized version, and state what the task still needs.
3. **Instructor check (10 min).** The instructor verifies W3 before you move on. Any missed item: redo that input.

Deliverable: W3 Sanitization drill

Input	Items stripped	Sanitized text	What the task still needs	Correct? (instructor)
1				
2				
3				

Completion criteria. Four cards with concrete checks; all three drill inputs correctly sanitized (Meets requires 3 of 3).

Lab 3 (Session 3): Final role playbook, peer review, and demo

Scenario. You leave with ten procedures you can use tomorrow, reviewed by someone who does your job.

Goal. Final playbook (ten cards), W4 peer review, and a two-minute live demo.

Steps

1. **Finish ten (40 min).** Add four procedures from your own W1 (or more track labs).
2. **Peer review (30 min).** Swap with a same-occupation peer. They follow two procedures cold and complete W4.
3. **Revise (15 min).** Fix every "couldn't follow" and every vague check.
4. **Lightning round (about 2 min each).** Run one procedure live, including the check.

Deliverable: W4 Peer review form

Card	Could follow? (Y/N, where stuck)	Check concrete?	Data rule right for our role?	Time realistic?	Suggestion

Completion criteria. Ten cards; two followed cold by a peer; all checks concrete; data rules correct; demo shows the check.

Appendix B: Rubric (Not yet / Meets / Strong)

Criterion	Not yet	Meets	Strong
Role relevance	Generic tasks not tied to the job	Procedures match real tasks in the job family	Peers adopt procedures for their own use
Verification	Checks vague or missing	Each procedure has a concrete check step	Checks include escalation when something fails
Data safety	Role-specific sensitive data in any card or prompt	Role-specific sensitive data correctly excluded; drill 3/3	Placeholders and strip lists built into every prompt
Usability	Peer couldn't follow	Peer from same occupation can follow the procedure	Peer followed cold with no questions

Appendix C: Track libraries (six guided labs and three drill inputs per track)

Each guided lab lists: input (fictional), prompt starter, check. Write a W2 card after each.

HR and recruiting: North Shore Builders

#	Guided lab	Input	Prompt starter	Check
1	Inclusive job posting	Skills list for Site Safety Coordinator; pay range $62,000-$74,000	See activity F06-S1-A3	Bias-language list reviewed; pay range present and exact; required vs preferred justified
2	30-day onboarding checklist	Handbook excerpt (orientation, PPE, payroll setup)	"Using only the handbook excerpt, build a day 1 / week 1 / 30-day checklist with owners"	Every item traces to the handbook; owners are roles
3	Policy FAQ	Remote-work policy text	"Write 8 FAQs answered only from the policy; mark unanswered questions"	Each answer quotes or matches the policy; gaps to HR lead
4	Structured interview guide	Skills list	"Draft 6 job-related behavioral questions with a 1-3 scoring guide"	Questions tied to skills; none about protected traits
5	Policy announcement email	Approved holiday schedule	"Announce the schedule to all staff, 120 words"	Dates match the schedule
6	Training sign-up reminder	Safety refresher details	"Reminder with deadline and link placeholder"	Date and link correct

Drill inputs: (1) a forwarded resume with name, phone, and prior employers; (2) an employee's leave request mentioning a medical condition; (3) a manager's note about a performance issue naming the employee. *Key:* all three are records that should not be used. The sanitized task is a generic template (e.g., "leave-request acknowledgment template with [EMPLOYEE] placeholders") or no AI.

Bookkeeping and accounting: Back Bay Accounting Partners

#	Guided lab	Input	Prompt starter	Check
1	Categorize transactions	Synthetic export of 40 lines (vendor, memo, amount) and the chart of accounts	"Suggest a category for each line from this chart; mark 'unsure' if unclear"	Spot-check 10 lines; any wrong means review that vendor's lines
2	Variance explanation	Category totals and your notes	"Explain the top 3 variances in plain language using only my notes for causes"	Every amount matches; no invented causes
3	Month-end close checklist	Firm's close steps (text)	"Order these steps into a dated checklist with owners"	No steps added or dropped
4	Client document request	List of missing items	"Polite request with a deadline"	Items and date correct
5	Policy summary for clients	New expense-receipt policy	"Summarize for clients in 5 bullets"	Matches policy
6	Formula helper	Description of a calculation	"Write the Excel formula and explain it"	Test on 3 rows by hand

Drill inputs: (1) the Reyes Landscaping email (activity F06-S2-A1); (2) a bank statement screenshot; (3) a payroll summary with employee names and amounts. *Key:* keep amounts and causes; strip names, business names tied to account digits, SSNs, statements; payroll by person is never used.

Healthcare front office: Charles River Family Dental

#	Guided lab	Input	Prompt starter	Check
1	Post-visit instructions at 6th-grade level	Approved generic after-extraction sheet	See activity F06-S2-A3	Clinical text unchanged; dentist approves
2	Insurance appeal letter template	Generic appeal structure	"Template with [PATIENT], [DATE], [PROCEDURE], [CLAIM #] placeholders"	No real data; reviewed per policy; filled only in the practice system
3	Phone FAQ script	Office hours, cancellation policy, parking	"Script answering 8 common calls from these facts only"	Every answer matches the policy sheet
4	Appointment reminder templates	Reminder policy	"SMS and email templates under 160 characters for SMS"	Placeholders only; opt-out wording per policy
5	New-patient welcome letter	Practice info sheet	"Warm, plain welcome letter"	Facts match the sheet
6	Staff huddle notes	Sanitized schedule summary ("3 hygiene, 2 new patients")	"Structure into a 5-item huddle agenda"	No patient details

Drill inputs: (1) a voicemail transcript with a patient's name, DOB, and tooth pain description; (2) a referral letter; (3) an insurance denial letter. *Key:* all contain PHI. The sanitized task is a generic template or script with placeholders; patient-specific work stays in the practice system.

Customer service and sales: Cape Harbor Inn and Lowell BioSupply

#	Guided lab	Input	Prompt starter	Check
1	FAQ-only answers	Cape Harbor Inn FAQ	See activity F06-S3-A2	Each answer in the FAQ; gaps routed
2	Follow-up after a call	Sanitized call summary (Lowell BioSupply glove order delay)	"Follow-up confirming next steps; no new prices or dates"	Commitments match the summary
3	Call plan from public profile	Public company profile of a fictional biotech prospect	"Call plan: 3 needs, 3 questions, 1 next step"	Facts from the profile only
4	Complaint acknowledgment	Sanitized complaint summary	"Acknowledge, apologize once, state next step"	No refunds promised
5	Product comparison sheet	Two product sheets	"Comparison table; leave blank if not stated"	Every cell traces
6	Review response	Public review (fictional)	"Professional reply under 80 words"	No guest details disclosed

Drill inputs: (1) a guest email with address, card digits, and a child's name; (2) a CRM export with contact emails; (3) a call note with an order number and the customer's mobile.

Project coordination: Bayside Precision Parts

#	Guided lab	Input	Prompt starter	Check
1	Status report from notes	Notes (activity F06-S2-A4)	"Status report: item, owner, status, date; TBD if unknown"	Each line matches notes; no green on at-risk
2	Risk log	Project plan excerpt	"Suggest risks with likelihood and impact; mark as draft for PM review"	PM reviews ratings and owners
3	Stakeholder update	Checked status report	"Customer-facing update, 150 words, no internal details"	Matches status; no confidential pricing
4	Meeting agenda	Open items list	"45-minute agenda with timeboxes"	All open items included
5	Action-item tracker	Meeting recap	"Table of actions with owner and date"	Owners agreed
6	Lessons-learned summary	Retrospective notes	"Group into themes"	Themes reflect notes

Drill inputs: (1) notes with a customer's confidential part drawing number and price; (2) notes mentioning an employee's medical leave; (3) an email with a supplier's bank details.

Office and administrative support: Merrimack Freight & Logistics

#	Guided lab	Input	Prompt starter	Check
1	Inbox rules	Description of what to file	"Write Outlook/Gmail rule steps for this"	Tested on 10 messages
2	Form letters	Policy for address-change confirmations	"Template with placeholders"	Matches policy
3	Travel checklist	Trip description (Lowell to a trade show in Atlanta, 3 days)	"Checklist: before, during, after"	Dates and policy limits from the travel policy
4	Event checklist	Holiday lunch plan	"Checklist with owners and dates"	Dates correct
5	Document cleanup	Messy policy file	"Standardize headings only; don't change text"	Before/after compare: no text changed
6	Meeting scheduling note	Availability summary	"Propose 3 times"	Time zones and attendees confirmed

Drill inputs: (1) a travel request with DOB and frequent-flyer number; (2) an address-change form with SSN; (3) an HR memo about a staff member.