Session 1 Handout: Using AI as a Manager

FAST-09 AI for Managers and Leaders · 7formations · Instructor: Wadood Chaudhary · All examples fictional · Training, not legal advice

Why this session matters

Your team watches what you do with AI more than what you say about it. Managers also handle the most sensitive information in a small business: reviews, pay, discipline, health notes, bids. Using AI well yourself, and visibly following the data rules, is the foundation for leading anyone else.

Key concepts

1. The manager's data line

Never in a prompt	Fine in the approved tool
Employee records, reviews, discipline and attendance notes	Your own sanitized notes
Salaries, pay, and benefits data	Generic descriptions ("a team member missed deadlines")
Customer personal information (G.L. c. 93H, 201 CMR 17.00)	Public documents: state guidance, vendor brochures
PHI, bids, unreleased financials, confidential drawings	Fictional or template text

Sanitize first: roles instead of names, no ID numbers, nothing that points to one person. An employee ID still identifies someone. Personnel records are regulated under G.L. c. 149, § 52C.

2. Three management tasks

1. **Team update from your notes.** Fence your facts; tell the tool not to add dates, rules, or approvals.
2. **Summary of a long document** (policy, vendor proposal). Ask for the points that commit money, time, or data, then check each one against the original.
3. **Talking points for a hard conversation.** Generic situation only. Ask for an opening, open questions, and a close. Remove anything that diagnoses the person.

3. Judge every output on three things

Check	Ask
Accuracy	Are every fact, number, date, and commitment right?
Fairness	Could any wording disadvantage someone (age, disability, gender, national origin)?
Tone	Is it right for the audience and the news?

4. Supervising AI-assisted work

- Ask: "Which parts were AI-assisted, and how did you check them?"

- Check facts, numbers, commitments, and that no restricted data was used.
- Hold the sender accountable, not the tool.
- Coach better prompts and checks. Don't ban it quietly.

Worked example (fictional)

A ClaimDraft Pro proposal summary came back as "affordable per-user pricing, flexible terms." The manager checked it against the original and found **auto-renewal unless cancelled 90 days before**, **up to 9% increases at each renewal**, and **customer content used to improve the vendor's service unless you opt out**. None of these were in the summary. The review note on W1: "Summary dropped renewal, price increase, and data-use clauses; rewrote with a terms checklist."

Checklist

- ☐ Sanitized every input; nothing that identifies a person.
- ☐ Fenced the facts and told the tool not to invent.
- ☐ Checked each output for accuracy, fairness, and tone.
- ☐ Wrote specific keep / fix / discard notes on W1.
- ☐ Noted where AI did *not* save time.

Do and don't

Do	Don't
Describe situations generically	Paste a review or HR file
Check commitments before sending	Let AI promise refunds, dates, or approvals
Ask how work was checked	Blame the tool for a sent error
Coach a better check	Quietly ban AI after one mistake
Record meetings only with everyone's consent	Use an AI recorder in a one-on-one without consent (G.L. c. 272, § 99)

Try this before session 2

List five places in your team's week where AI might help: the task, who does it, and roughly how long it takes.