



Productivity with AI

Writing, summaries, research and meetings: using AI at your desk, with checks that fit the work.

Ekalavya Academy by Almost Magic

Short Book 2 of 10 | Free to read and share

almostmagic.net.au

BEFORE YOU START

How to read this book

1

Learn

A few slides explain one idea in full sentences.

2

See it

A short, made-up example gives the idea a face.

3

Try it

A ten-minute exercise in the tools you already use.

4

Check it

Three questions. Guidance is at the back, not next to the question.

5

Keep it

A four-sentence summary to come back to.

Two levels in every chapter. The main slides are written so a first-time reader can follow them. A "Going deeper" slide gives the same idea at the level an experienced reader would argue about.

This book works with any AI tool you already have. It never asks you to buy or sign up for a particular product.

THE PLAN

Where this book sits in the series

Book 1	What AI is, and what it is not	Foundations
Book 2	Productivity with AI: writing, summaries, research, meetings	Practical use
Book 3	From one task to a repeatable workflow, and AI deputies	Workflow automation, agents
Book 4	Handling data safely	Data handling
Book 5	When a data shortcut becomes the rule	Data quality and governance
Book 6	Staying secure with AI	Security
Book 7	Rules, risk and what you must know	Risk and compliance awareness
Book 8	Your AI rules on one page	Policy and accountability
Book 9	When AI gets it wrong	Recovering from AI mistakes
Book 10	When not to use AI, and who stays in charge	Judgement and oversight

Each book works on its own. Read them in order or pick the one you need.

CONTENTS

In this book

Chapter 1

Writing and editing

Chapter 2

Summarising documents and email

Chapter 3

Research and learning

Chapter 4

Meetings and planning

At the back

Guidance and answers for every question and exercise

CHAPTER 1

Writing and editing

By the end of this chapter you will be able to:

Use AI to draft, edit and change the tone of your writing.

Bring your own facts and voice to the draft.

Check a draft for claims, promises, tone and private details.

Keep your own sign-off on what goes out.

Time: about 40 minutes, including the exercise.

LEARN

Drafting: you bring the facts

AI is good at a first version. You bring the facts, the purpose and the reader. The tool brings structure and wording.

Start with your own rough notes. A tool works from what you give it, so the draft stays closer to what you mean.

Read the draft as if a stranger wrote it. In effect, one did.

REMEMBER

You bring the facts. It brings the wording.

LEARN

Six editing jobs AI does well

Shorten

Cut a long message to half its length, then look at what was lost.

Simplify

Rewrite in plain words for a reader who is new to the topic.

Change tone

Make a message warmer, firmer or more formal.

Fix mistakes

Spelling, grammar and clumsy sentences.

Reorder

Put the main point first and the detail after.

Translate

Translate a message, then ask a fluent speaker to check it. Small errors in meaning are easy to miss.

LEARN

Check before it goes out

Claims

Is every fact, figure and date true? Check against your records.

Promises

Did the draft agree to a price, a deadline or a refund you did not intend?

Tone

Would you say this to the person's face? Does it sound like you?

Private details

Does it hold information that should not be shared with this reader?

GOING DEEPER

Voice, sameness and ownership

Your voice

Tools lean toward an average, polished style. One or two examples of your own writing help it come closer to your voice, but you will still edit.

Sameness

If everyone sends the same smooth wording, messages start to sound alike. Specific details from your business are what make a message yours.

Saying AI helped

Some readers and some rules expect you to say when AI helped. Check what applies to your work, and decide your own line.

Ownership

You are responsible for what goes out under your name, including anything the tool added that you did not notice.

SEE IT

A short example

Lena owns a small florist shop. She asks a tool to write a message to a wedding client about a delay in flower delivery.

The draft sounds warm, but it says the flowers will be "fully refunded if not perfect". Lena never offered that.

She notices it on her promises check, deletes the line and adds the real delivery time. She also changes two phrases that do not sound like her, then sends it.

THE LESSON

Check for promises you did not make.

This is a made-up example for teaching.

TRY IT

Draft, check, own

1

Pick a message you need to write this week that holds no private details.

2

Write three lines of rough notes, then ask your tool for a draft.

3

Run the four checks: claims, promises, tone, private details.

4

Edit it until it sounds like you. Note what you changed.

YOUR TOOLS

Use any tool you already have.
Do not paste customer or
private business details.

GUIDANCE

What to look for is on slide 42.

CHECK IT

Check yourself

Question 1

Why start from your own rough notes rather than a blank request?

Question 2

Name two things to look for in a draft besides spelling.

Question 3

A draft says "we guarantee delivery by Friday". You never decided that. What do you do?

Answer in your own words before you turn to slide 42.

KEEP IT

Chapter 1 in four sentences

KEEP THIS

A tool can give you a good first draft when you bring the facts and the purpose. Use it for editing jobs such as shortening, simplifying and changing tone. Before anything goes out, check the claims, the promises, the tone and the private details. What goes out under your name is yours.

CHAPTER 2

Summarising documents and email

By the end of this chapter you will be able to:

Ask for a summary that suits the reader and the purpose.

Check a summary for missing and added points.

Know when not to rely on a summary.

Keep private documents out of the wrong tools.

Time: about 40 minutes, including the exercise.

LEARN

What a summary can and cannot do

A summary shortens a long text so you can decide what to read closely. It is useful for orientation: what is this about, and do I need to act?

It is risky for detail. A short version leaves things out. A tool may also add a point that is not in the original, or change a number.

Use a summary to decide where to look. Do not use it in place of the part that matters.

IN PLAIN WORDS

A summary is a map, not the ground.

LEARN

Ask for the summary you need

State the purpose

Say what you will do with it: decide, reply, or brief someone else.

Set the shape

Ask for five bullets, or for decisions, dates and actions only.

Ask where it came from

Where the tool can, ask it to say where each point comes from, so you can check quickly.

Ask what was left out

Ask the tool to list topics in the document that it did not include.

LEARN

Check a summary

Numbers and dates

Check every figure, name and date against the original.

Added points

Look for anything in the summary that is not in the document.

Missing points

Skim the original headings for anything important that is missing.

Meaning

Check negatives and conditions. "Must not" and "may" are easy to blur.

GOING DEEPER

Why summaries slip

Compression

To shorten, the tool must drop things. What it drops is a guess about what matters, and it may guess differently from you.

Long documents

Tools can handle very long inputs less reliably. Splitting a long document into parts and summarising each is safer.

Summaries of summaries

Each round of shortening loses more. If it matters, go back to the original.

Confidentiality

The tool receives the whole document you paste. Before pasting, ask whether that document may go into that tool. Book 4 covers this.

SEE IT

A short example

Marcus is an office manager. A supplier sends a four-page contract update. He asks a tool for a summary and gets five tidy bullets.

The bullets say the notice period is 30 days. He checks the clause. It says 30 days for the supplier and 60 days for his own company.

He asks again, this time for every date and deadline and who each applies to, and checks the result against the clause.

THE LESSON

Summaries find the page.
You read the clause.

This is a made-up example for teaching.

TRY IT

Summarise and check

1

Pick a document of two or three pages that is safe to share.

2

Ask for a summary for a stated purpose, in five bullets.

3

Check numbers, added points, missing points and meaning.

4

Ask what it left out, and see if that matches what you found.

YOUR TOOLS

Use any tool you already have.
If you are not sure a document
is safe to share, choose a
different one.

GUIDANCE

What to look for is on slide 43.

CHECK IT

Check yourself

Question 1

Why is a summary risky for a contract clause?

Question 2

What should you do before pasting a document into a tool?

Question 3

Name two ways a summary can mislead even when it is well written.

Answer in your own words before you turn to slide 43.

KEEP IT

Chapter 2 in four sentences

KEEP THIS

A summary helps you decide where to look. It can leave things out, add things and change meaning. State the purpose, ask for the shape you need and check numbers, additions, gaps and meaning. For anything that matters, read the original.

CHAPTER 3

Research and learning

By the end of this chapter you will be able to:

Use AI to get oriented in a new topic.

Ask for sources and check that they are real.

Compare what a tool says with trusted sources.

Know when to stop and ask a specialist.

Time: about 40 minutes, including the exercise.

LEARN

A good first scan, not the last word

AI is useful for a first look at a new topic: the main ideas, the usual terms and the questions worth asking.

It can also explain a hard idea at different levels, and give examples you can use to test yourself.

It is a poor place to end. For anything you will act on, move to the sources that people in the field rely on.

IN PLAIN WORDS

Start with the tool.
Finish with the source.

LEARN

Four ways to use it for learning

Explain it simply

Ask for the idea in plain words, then at a deeper level once you follow.

List the questions

Ask what an expert would ask, so you know what you do not yet know.

Test you

Ask it to quiz you, then check the answers in a reliable source.

Compare options

Ask for the pros and cons of two approaches. Treat the answer as a list of things to verify.

LEARN

Checking sources

Does it exist?

Open the link or find the title yourself. Made-up references are common.

Does it say that?

Read the passage. A real source may not support the claim.

Is it current?

Check the date. Rules, prices and guidance change.

Is it trusted?

Prefer official bodies, original documents and recognised experts.

GOING DEEPER

Search tools and where authority sits

Search-connected tools

Some tools search the web and cite pages. This helps, but the tool can still pick a weak page or misread a good one.

Weakest where you know least

On a topic you know little about, you are least able to spot errors. That is when to lean harder on sources.

Different tools, different answers

Two tools can give different answers. Treat disagreement as a sign to check, not as a vote.

Know the edge

Legal, medical, tax and safety questions about your own situation belong with a qualified person. The tool can help you prepare the questions.

SEE IT

A short example

Hana is thinking about buying a commercial coffee machine for her cafe. She asks a tool how to compare machines and what to ask a supplier.

She gets a useful list of questions. She also asks for reviews and gets two titles that she cannot find anywhere. She drops them.

She takes the question list to two suppliers and reads their written specifications herself.

THE LESSON

Use the tool for questions.
Use suppliers and
specifications for facts.

This is a made-up example for teaching.

TRY IT

A first scan, checked

1

Choose a topic you need to learn about for work.

2

Ask your tool to explain it in plain words and to list five questions an expert would ask.

3

Ask for three sources, then try to find each one.

4

Write down what you still need to confirm, and where you will look.

YOUR TOOLS

Use any tool you already have.
Do not include private or customer information in your questions.

GUIDANCE

What to look for is on slide 44.

CHECK IT

Check yourself

Question 1

What is a good use of AI at the start of research?

Question 2

A tool gives you a reference. What are two checks before you rely on it?

Question 3

Why should a question about your own tax situation go to a qualified person?

Answer in your own words before you turn to slide 44.

KEEP IT

Chapter 3 in four sentences

KEEP THIS

AI is useful for a first scan of a new topic: ideas, terms and questions. Ask for sources and check that they exist, say what the tool claims, are current and are trusted. Treat disagreement between tools as a prompt to check. Questions about your own legal, tax, medical or safety situation go to a qualified person.

CHAPTER 4

Meetings and planning

By the end of this chapter you will be able to:

Turn rough notes into clear minutes and action lists.

Prepare agendas and follow-ups.

Know to check the rules on recording and transcribing meetings.

Keep a named person responsible for each action.

Time: about 40 minutes, including the exercise.

LEARN

Before the meeting

A tool can turn a goal into a draft agenda, a list of questions to settle and a short pre-read.

Give it the purpose, the people and the time you have. Ask it to put decisions first.

Send the agenda under your name once you have read it and removed anything that does not fit.

REMEMBER

The agenda is your plan.
The tool drafts it.

LEARN

After the meeting

Clean up notes

Paste your own rough notes and ask for minutes: decisions, actions, who and by when.

Draft the follow-up

Ask for a short email to attendees that lists the actions.

Spot gaps

Ask what is missing, such as an action with no owner or a decision with no date.

Ask people to confirm

Ask attendees to confirm their actions. The tool was not in the room, and may have guessed.

LEARN

Recording and transcripts

Some tools can record a meeting and write a transcript. Rules on recording and on telling people vary by place and by organisation.

Before you record, check what applies to you, tell everyone in the meeting and let them say no. Check where the recording and transcript are stored and who can see them.

For sensitive meetings, such as HR, legal or customer matters, take notes yourself unless you are sure the rules allow otherwise.

RULE OF THUMB

Tell people first. Keep sensitive meetings out.

GOING DEEPER

Actions need owners

A tool cannot own an action

It can list an action. Only a person can accept it. An action with no named person tends not to happen.

Transcripts are not minutes

A transcript records words. Minutes record decisions. Turning one into the other takes judgment about what mattered.

Mishearing

Transcripts can get names, numbers and technical terms wrong, especially with accents or background noise. Check them.

Retention

Decide how long recordings and transcripts are kept and who can delete them. Keeping everything forever is a risk, not a feature.

SEE IT

A short example

Daniel runs a small accounting practice. After a client call he pastes his own notes into a tool and asks for minutes with actions.

The tool lists five actions and gives two of them to Daniel that were actually the client's. He fixes the owners, adds dates and emails the minutes to the client to confirm.

The client corrects one date.

THE LESSON

Ask people to confirm their own actions.

This is a made-up example for teaching.

TRY IT

Minutes you can trust

1

Take notes from a real meeting this week, with private details removed.

2

Ask your tool for minutes: decisions, actions, owners, dates.

3

Mark any action with no owner or no date, and any owner you did not agree.

4

Send the minutes to one attendee to confirm.

YOUR TOOLS

Use any tool you already have.
If the notes hold private details,
remove them first.

GUIDANCE

What to look for is on slide 45.

CHECK IT

Check yourself

Question 1

Why should a person confirm each action?

Question 2

What is the difference between a transcript and minutes?

Question 3

What should you do before using a tool to record a meeting?

Answer in your own words before you turn to slide 45.

KEEP IT

Chapter 4 in four sentences

KEEP THIS

A tool can draft agendas, clean up notes and write follow-ups. Give each action a named person and ask them to confirm it. A transcript is not minutes. Before recording a meeting, check the rules, tell people and keep sensitive meetings out.

AT THE BACK

Guidance and answers

Questions and exercises stay in the chapters, on their own slides.
Guidance lives here, so you can try first and look afterwards.

Try the task or question in your own words, then compare. Where your answer differs, that is worth a note, not a correction.

WHERE TO FIND IT

Slides 42 to 45: answers
and exercise guidance, one
slide for each chapter.

GUIDANCE

Chapter 1: answers and guidance

Answer 1

The tool works from what you give it. Your notes keep the draft close to the facts and to what you mean.

Answer 2

Any two of: false claims, promises you did not make, a tone that is not yours, or private details that should not be there.

Answer 3

Remove or change the line before sending. A tool can add promises that sound reasonable. You are responsible for what goes out.

Exercise

Common changes: removing a stock phrase, correcting a detail, softening or firming the tone. If you changed very little, check that you read the draft closely rather than skimming.

GUIDANCE

Chapter 2: answers and guidance

Answer 1

Contracts depend on exact wording, conditions and who each term applies to. A summary can blur or drop these. Read the clause.

Answer 2

Check that you are allowed to share that document with that tool. If you are unsure, do not paste it, and ask.

Answer 3

It can leave out an important point, add a point that is not in the original, or change a number or a condition.

Exercise

Most people find one missing point and one small change. If the summary was perfect, try a harder document, such as one with conditions or exceptions.

GUIDANCE

Chapter 3: answers and guidance

Answer 1

Getting oriented: the main ideas, the terms and the questions to ask. Then move to trusted sources.

Answer 2

Any two of: it exists, it says what the tool claims, it is current, it comes from a trusted source.

Answer 3

The answer depends on your exact facts and current rules, and a mistake can be costly. The tool can help you prepare questions for the person.

Exercise

Many people find at least one reference they cannot locate. Your list of things to confirm is the real result: it is your next step.

GUIDANCE

Chapter 4: answers and guidance

Answer 1

The tool may have guessed an owner or a date. A person who accepts the action is what makes it real.

Answer 2

A transcript records what was said. Minutes record the decisions and actions, which takes judgment about what mattered.

Answer 3

Check the rules that apply to you, tell everyone, let them say no, and check where the recording is stored and who can see it.

Exercise

Common finds: an action with no owner, a date the tool invented, and a decision that was discussed but never made. Those are the things minutes exist to catch.

FIND OUT MORE

About Ekalavya Academy

Ekalavya Academy is a learning series from Almost Magic Tech Lab. The books are written for people who teach themselves, using the tools they already have.

Almost Magic builds tools that help people check and govern their AI use. The books never depend on those tools.

LINKS

Almost Magic: almostmagic.net.au

Case studies: ai-casestudies.almostmagic.net.au

Page for this book on the Academy site: link to be added when the page exists.