



Creating Repeatable & Reliable AI for Informers

Jake Lucas

AI Developer



Agenda

1.

The Pros and Cons about using AI to enhance data analysis and data accessibility in Informer

Best practices on how to max out the Pros and minimize the Cons

2.

- You can use these tips with OOTB tools (like ChatGPT)
- Developers can use these tips to build better AI tools





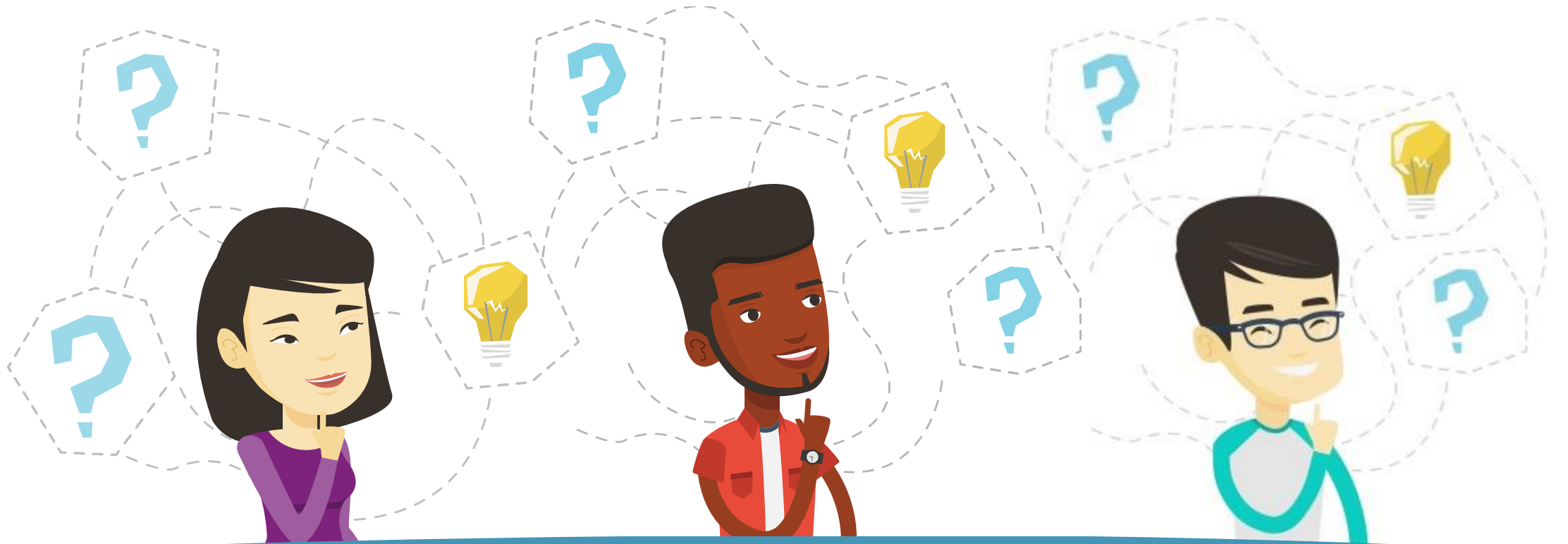
JAKE LUCAS

AI DEVELOPER

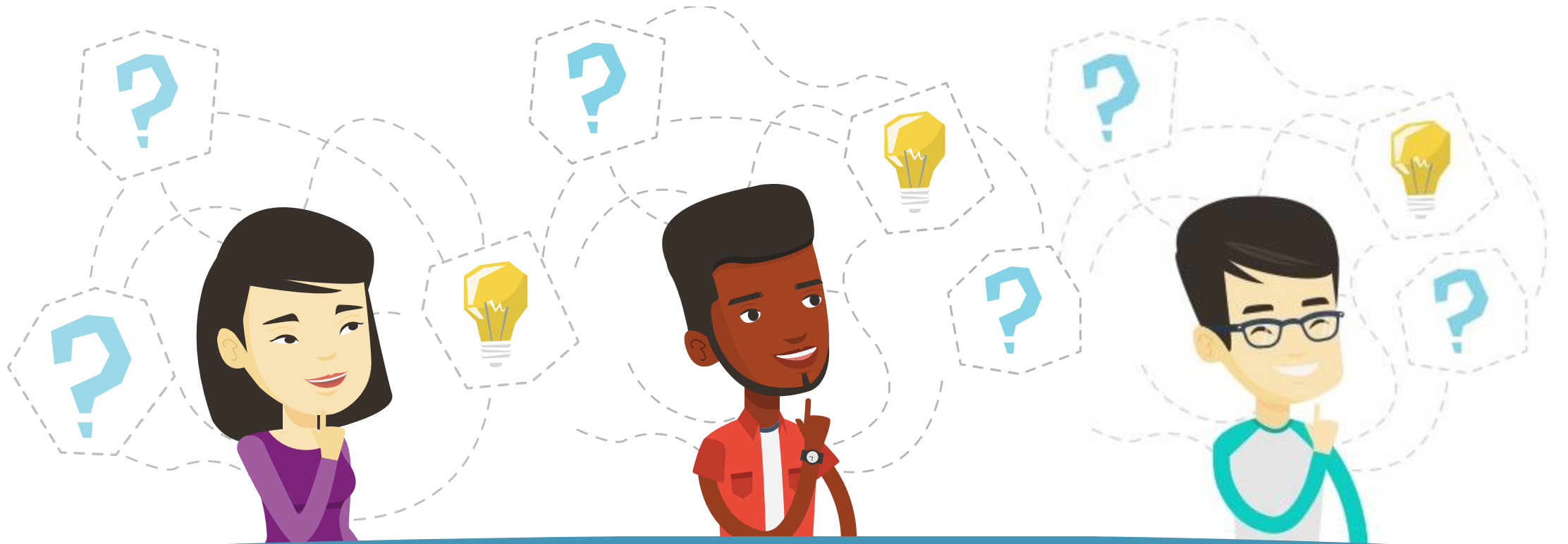
- Robust background in software development
- Developing AI-driven solutions
- Integrating advanced AI into Informer Connector & Vantagepoint

SPECIALTY

Creating custom workflows leveraging LLMs to increase efficiency of internal & external business practices



Who here has used
AI at least one time?



Keep your hand up if AI has ever blown your mind before.

It has certainly
blown mine!

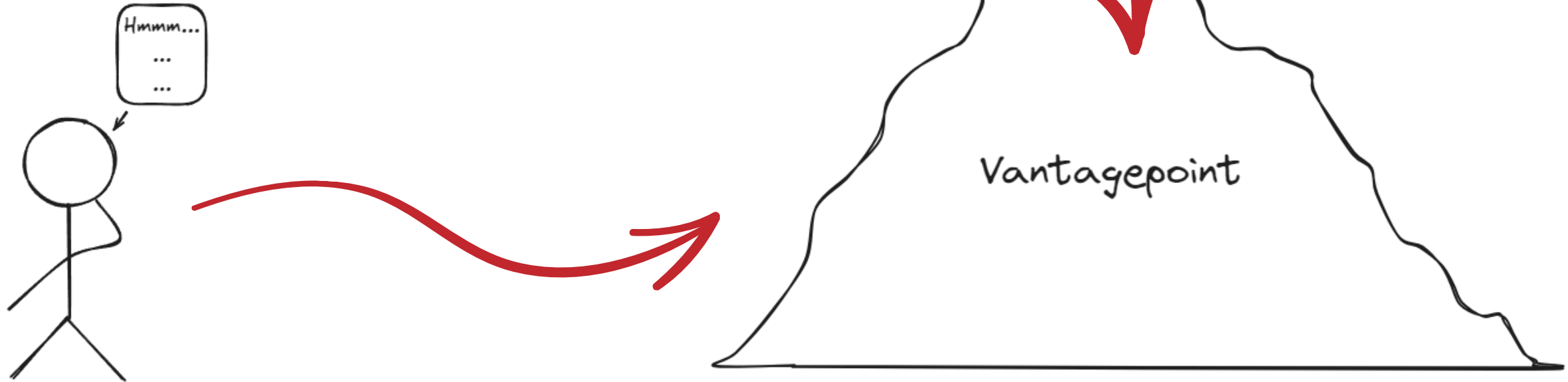




I've been developing AI applications for awhile and, from what I've seen, AI can be super valuable, especially in a business setting.

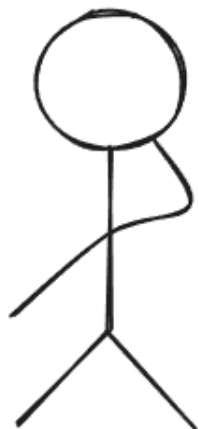
For example:

There is a **mountain of useful information sitting inside your ERP system**. Imagine for a second you could effectively **search through that mountain with a single message?**



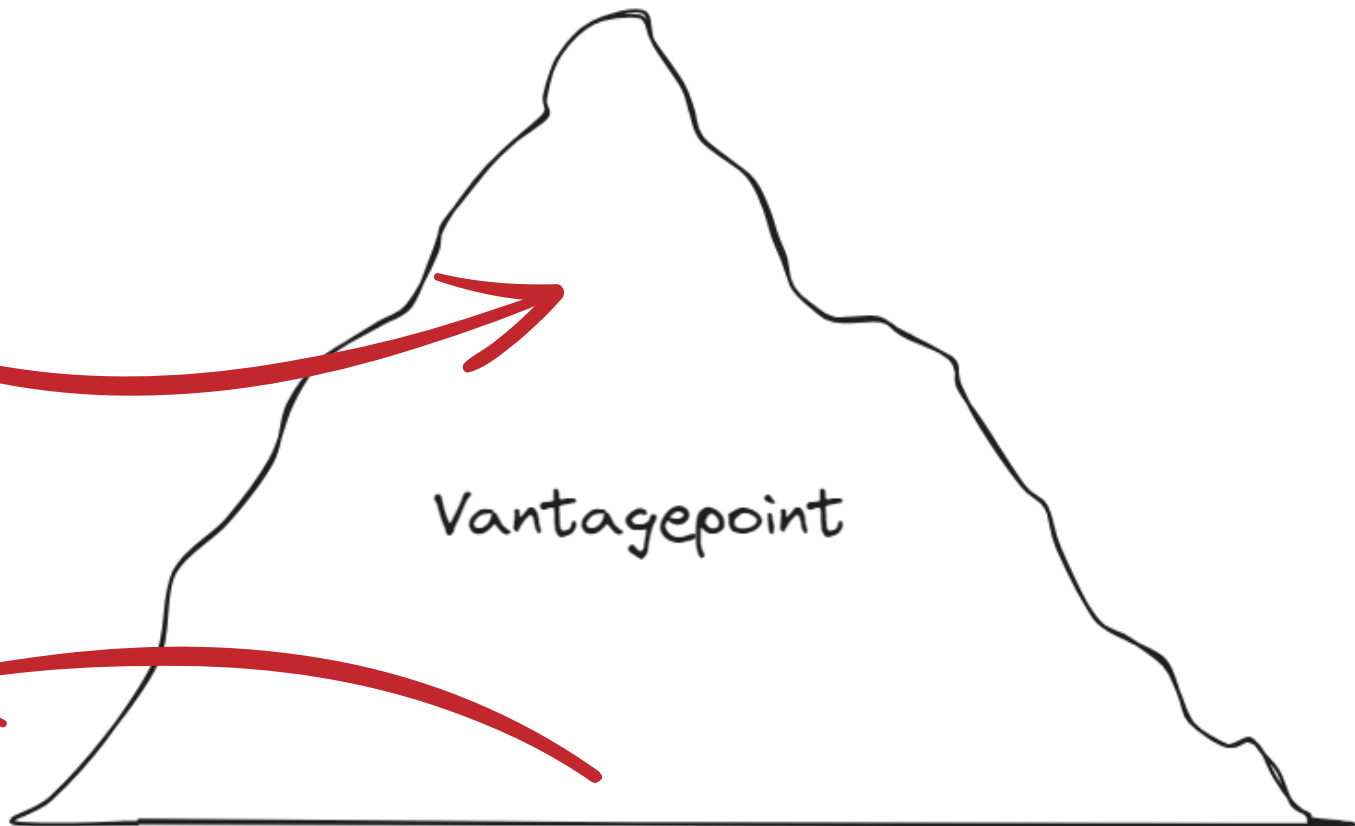


How much **easier** would it be to make **informed business decisions**?



How's our revenue in Q1 compared to last Q4?

The revenue for this year's Q1 totaled 10.97M while the revenue for last year's Q4 totaled 11.76M
[\(Link to see the data\)](#)

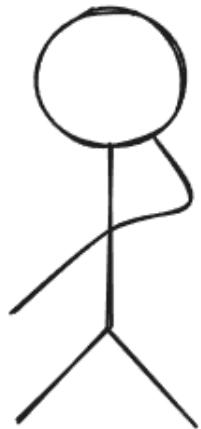




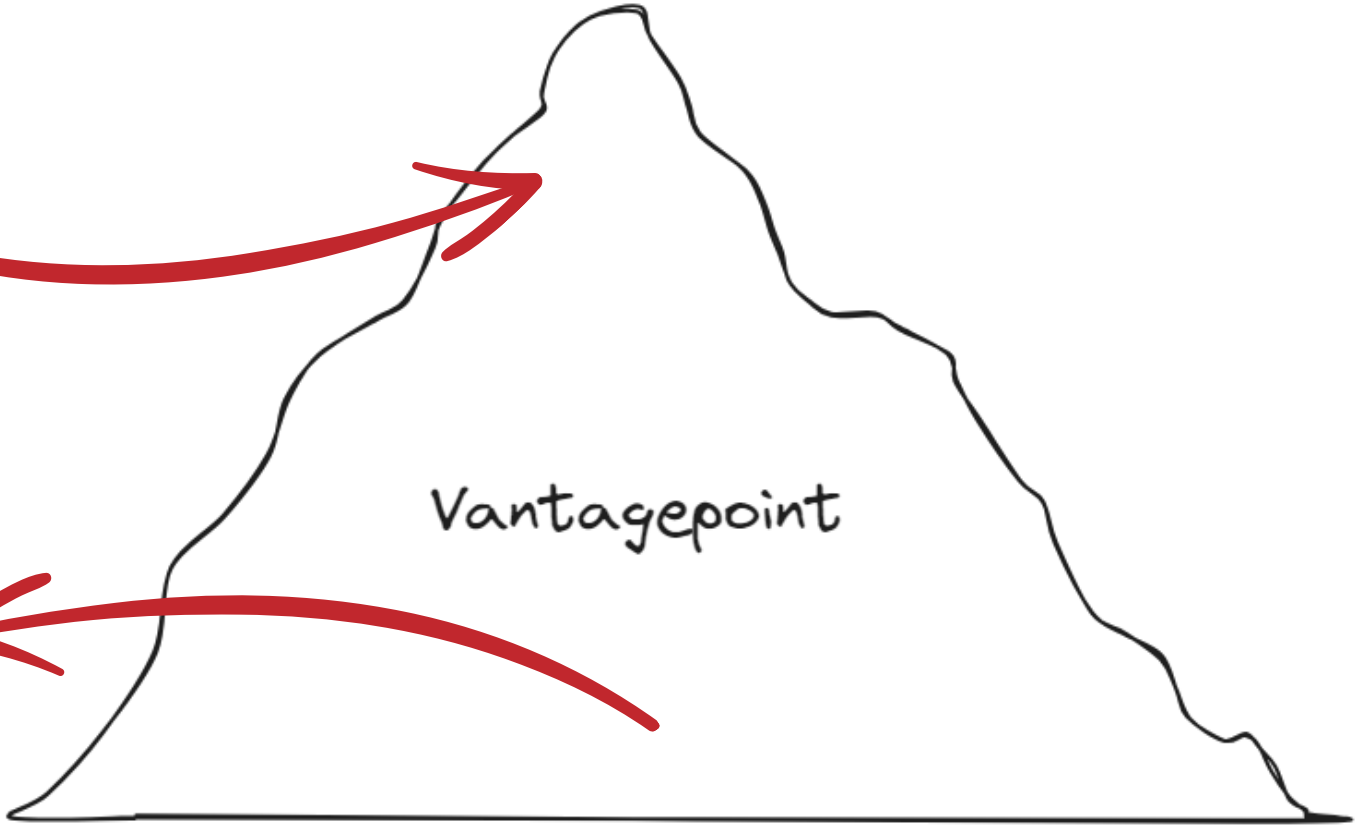
How much more quickly could you figure out that something needs your attention?



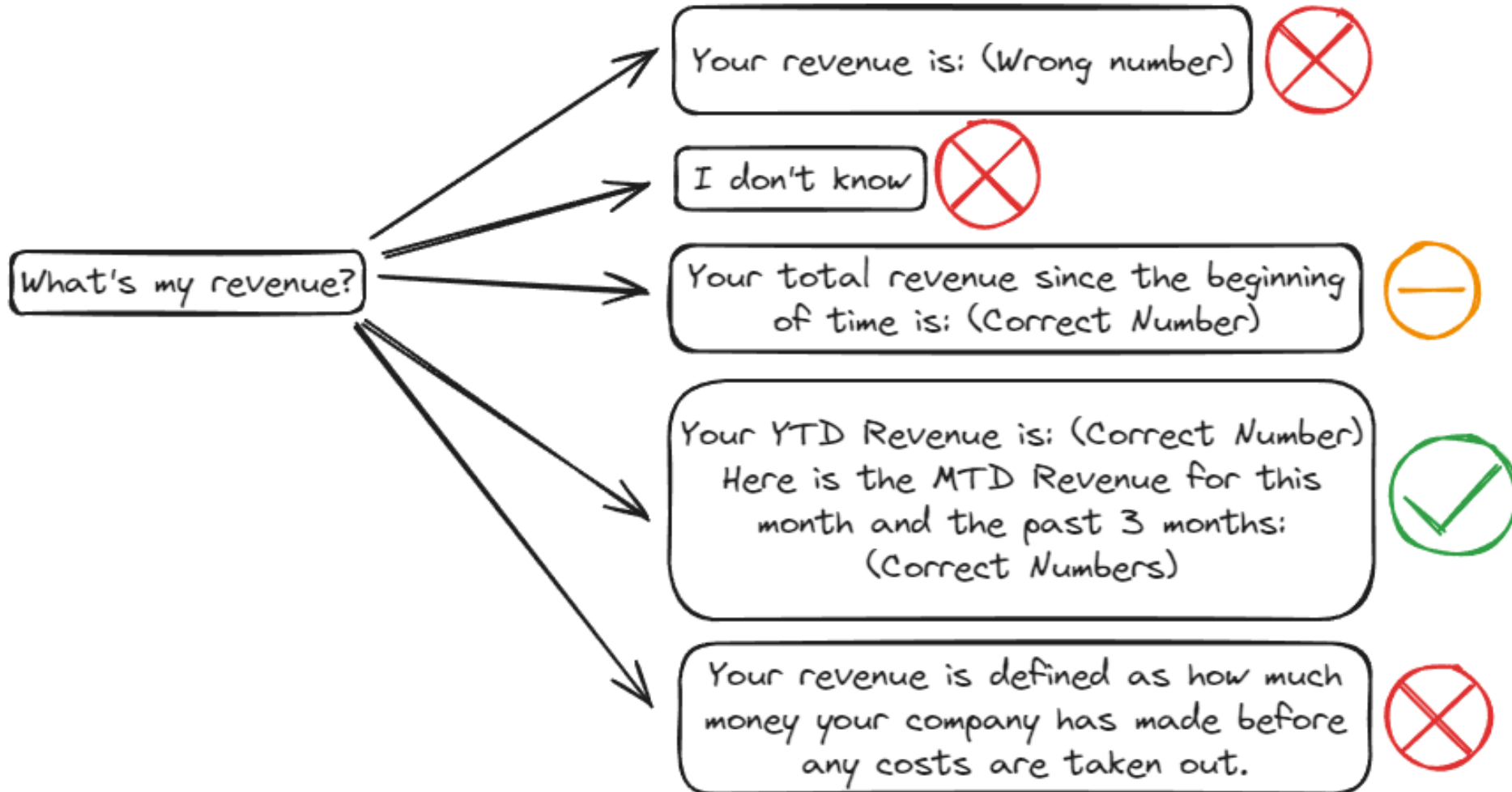
Are any projects getting close to budget?



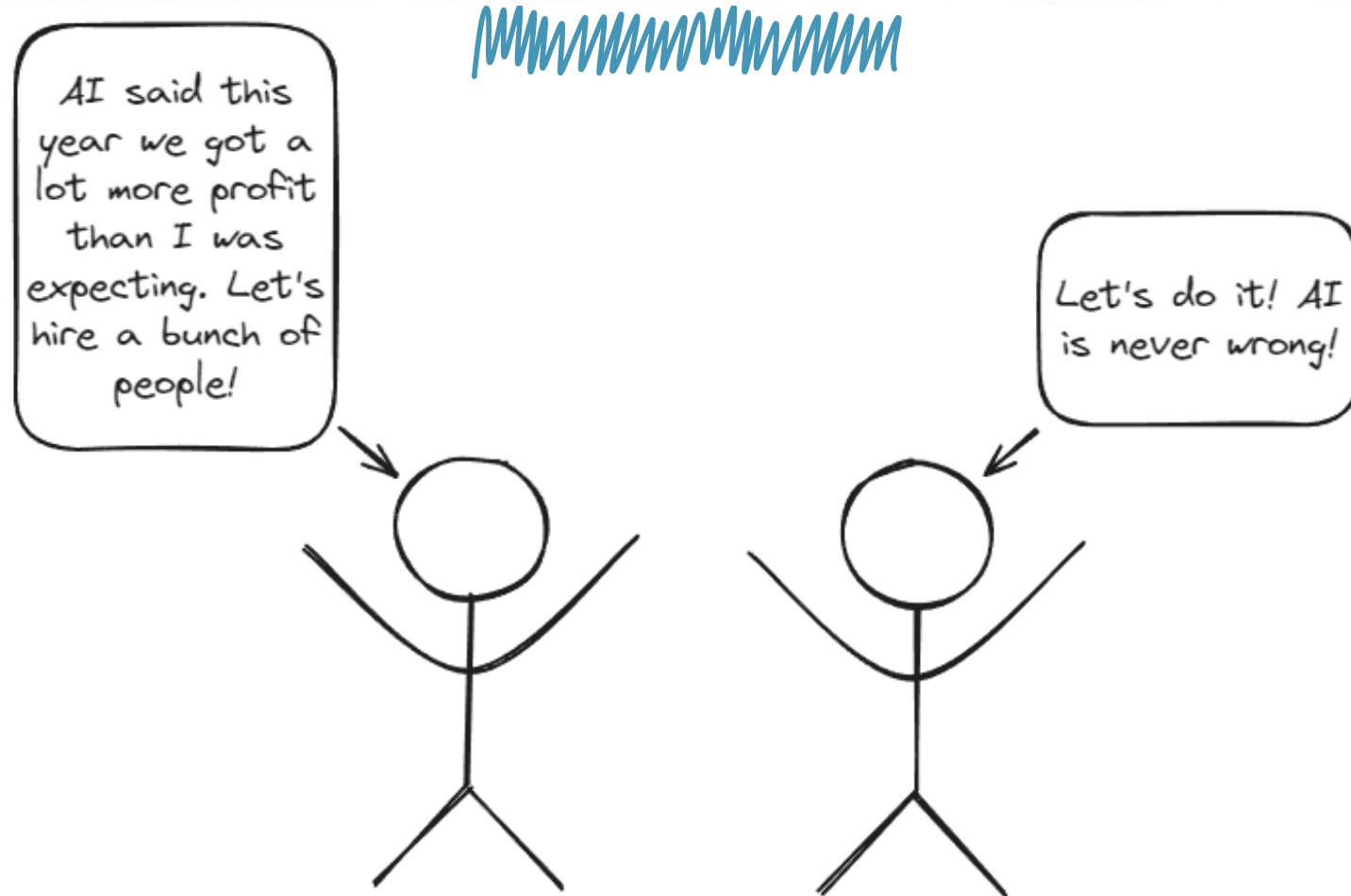
Yes, 3 projects are within 10% of the budget and 1 project is over budget:
024-185731: Close to budget
023-561956: Close to budget
018-956192: Close to budget
011-125625: Over budget
(Link to see the data)



The problem for any AI application like that has always been figuring out how to reliably get the exact answer we're looking for



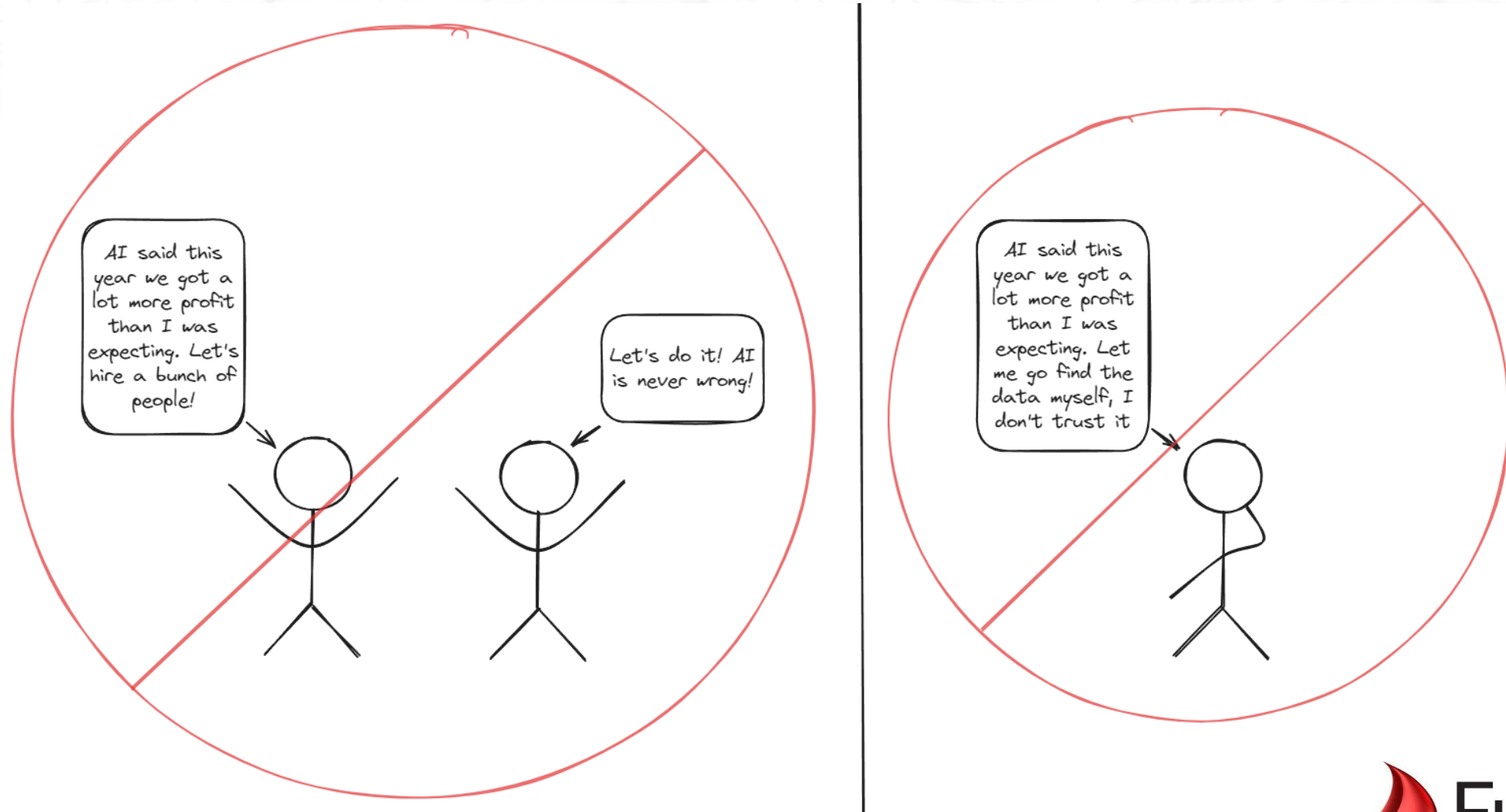
**After all, a "solution" that sometimes feeds you bad intel is not a solution at all.
That's an accident waiting to happen...**



**...Or it's a
waste of time**



If AI is going to be useful, avoiding these two situations (especially the first) is critical

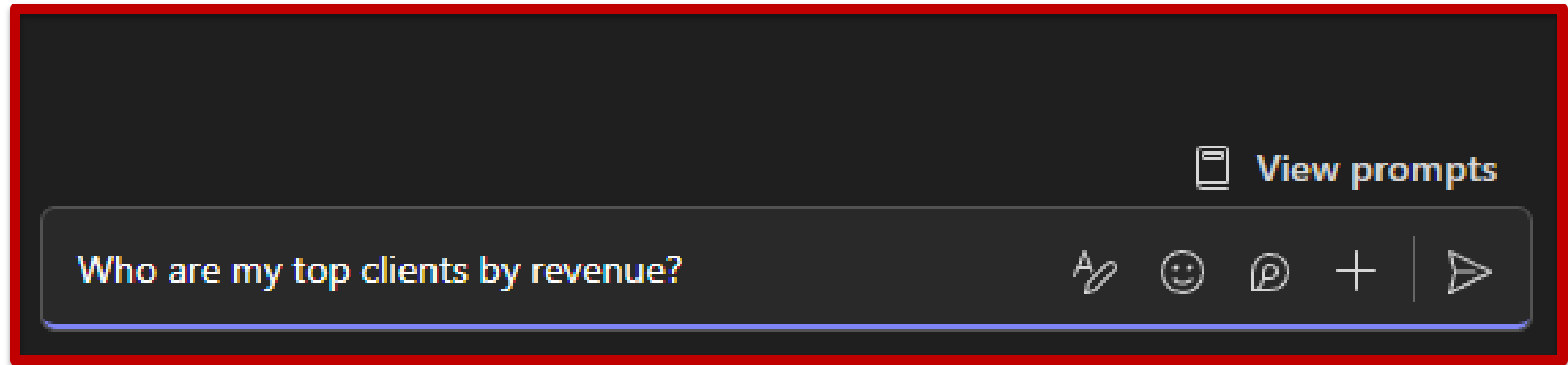




Here's what such an AI looks like in practice:



You can ask any question on your data:



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TEAMS



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The AI will figure out what you mean, and give you a specific answer:



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INFORMER

6:37 AM

Who are my top clients by revenue?

Informer Assistants 6:38 AM

Opportunity (Custom):

The top clients by revenue are:

Top Clients by Revenue

1. NBBJ Corporate with \$150,184,175 in total revenue ([see data](#))
2. HKS Architects, Inc. with \$90,031,500 in total revenue
3. Boulder Associates with \$90,000,000 in total revenue

With the answer, the AI will “show its work”:



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INFORMER

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Opportunity (Custom):

The top clients by revenue are:


Top Clients by Revenue


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2. HKS Architects, Inc. with \$90,031,500 in total revenue
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Open Link

Copy Link



+ Filter 

Client Name  Add Group Summary Only RESET VIEW Columns Aggregates Options

Group	Client Name ClientName	Sum ↓	Opportunity Name OpptName	Zip ZIP	Closed Date Closed	Open Date Opened	Qtr End QtrEnd	Source Source	Sta
▼ NBBJ Corporate (15)	NBBJ Corporate	150,184,175.00							
	NBBJ Corporate	90,000,000.00	Gig Harbor Hospital (w/NBBJ)		1/8/2004	1/7/2004	12/31/2003	Client	
	NBBJ Corporate	60,000,000.00	Overlake Hospital Medical Center South C		1/23/2004	1/16/2004	12/31/2003	Client	
	NBBJ Corporate	64,000.00	VMC Central Plant Master Plan Scope De		7/22/2005	7/22/2005	6/30/2005		
	NBBJ Corporate	39,900.00	Swedish Medical Center NICU Renovator		1/19/2005	1/17/2005	12/31/2004	Client	
	NBBJ Corporate	22,800.00	St. Joseph Hospital Cath Lab Remodel		6/23/2005	6/23/2005	3/31/2005		
	NBBJ Corporate	21,455.00	St. Joseph Hospital Childbirth Center Re		6/23/2005	6/23/2005	3/31/2005		
	NBBJ Corporate	16,665.00	St. Joseph Hospital Observation (Old ICU		6/23/2005	6/23/2005	3/31/2005		
	NBBJ Corporate	12,810.00	VMC Family Center CA Services Add Serv		1/5/2005	1/3/2005	12/31/2004		
	NBBJ Corporate	2,545.00	VMC Family Center CA Services Add Serv		1/5/2005	1/3/2005	12/31/2004		
	NBBJ Corporate	1,500.00	VMC Family Center CA Services Add Serv		1/5/2005	1/3/2005	12/31/2004		
	NBBJ Corporate	920.00	VMC Family Center CA Services Add Serv		4/15/2005	4/15/2005	3/31/2005		
	NBBJ Corporate	890.00	VMC Family Center CA Services Add Serv		1/5/2005	1/3/2005	12/31/2004		
	NBBJ Corporate	690.00	VMC Family Center CA Services Add Serv		4/15/2005	4/15/2005	3/31/2005		
	NBBJ Corporate	0.00	VMC Surgery Repackage Construction Dc		7/8/2005	7/8/2005	6/30/2005		
	NBBJ Corporate	0.00	Kaiser Portland West Hospital and Medic		1/21/2005	1/21/2005	12/31/2004		
> HKS Architects, Inc. (4)	HKS Architects, Inc.	90,031,500.00							
> Boulder Associates (1)	Boulder Associates	90,000,000.00							
> MOZ (3)	MOZ	10,071,050.00							
> Arai Jackson Ellison Murakam... (8)	Arai Jackson Ellisor	15,000,000.00							
> Pfeiffer Partners Architects, In... (1)	Pfeiffer Partners An	12,000,000.00							
> Schacht Alesi Architects (1)	Schacht Alesi Arch	10,000,000.00							
		425,728,335.00							

Letting you verify the answer with a single click...



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> MG2 (3)	MG2	15,077,690.00							
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> Sebacht Alesi Architects (1)	Sebacht Alesi Arch	12,000,000.00							
		425,728,335.00							

...And dig deeper into the data if you need to



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Let's Unpack That



I'll give an overview of the two main principles that make this possible



- And how knowing these principles can help you

The Two Principles:

1

A Window into the Facts



2

Reliability Training

One-Path Prompting

Problem Expansion

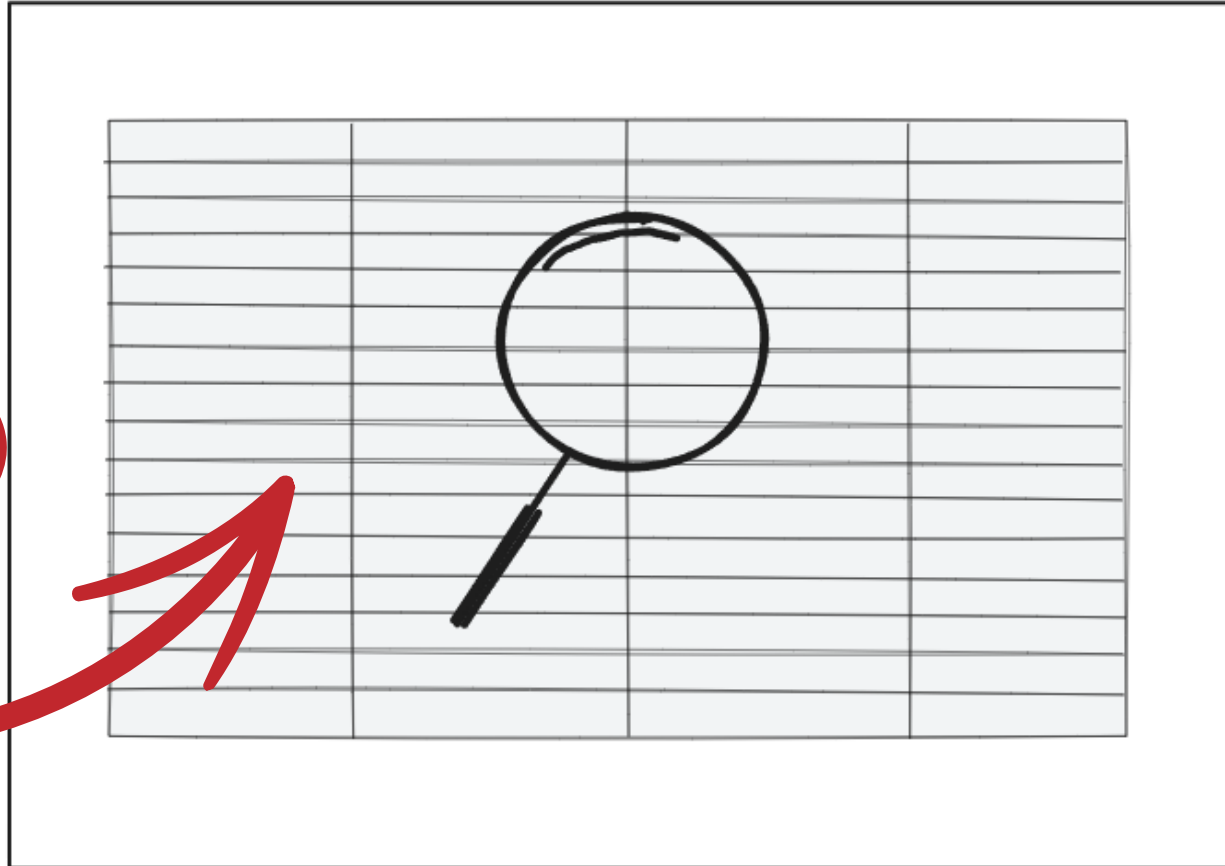
+

AI University

=

↑ Reliability ↑

A Window into the Facts





Put simply,
"Show me the proof."

6:37 AM

Who are my top clients by revenue?

Informer Assistants 6:38 AM



Opportunity (Custom):

The top clients by revenue are:

Top Clients by Revenue

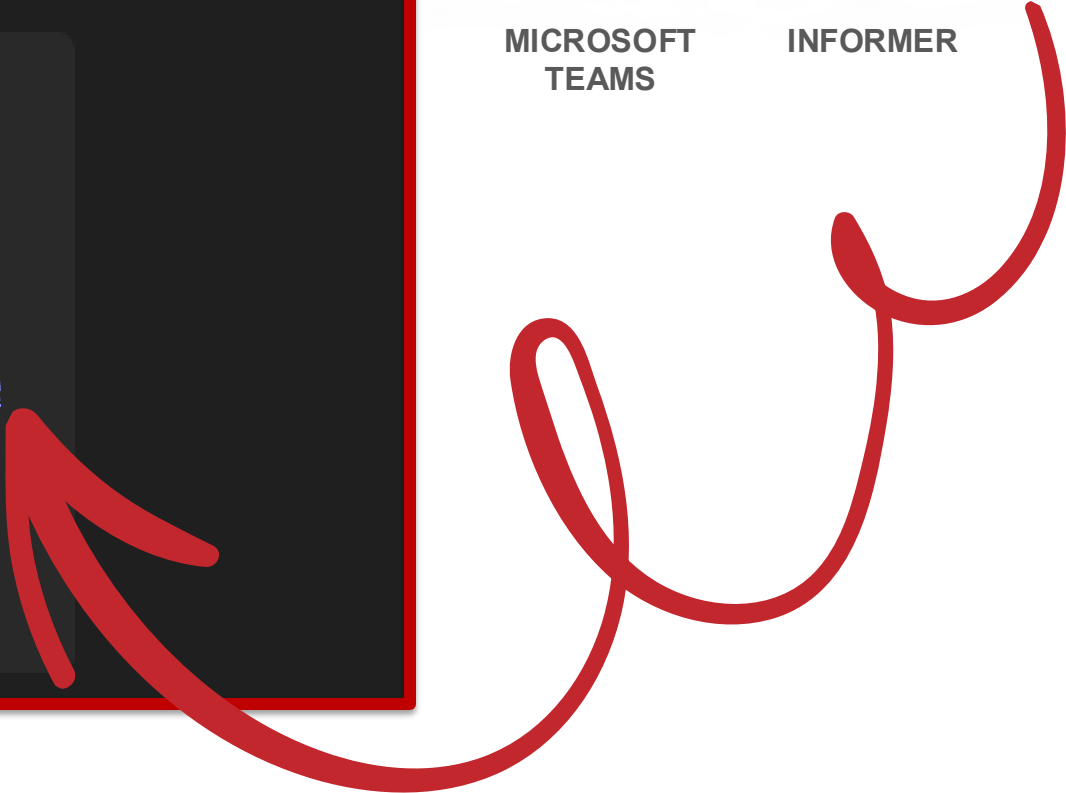
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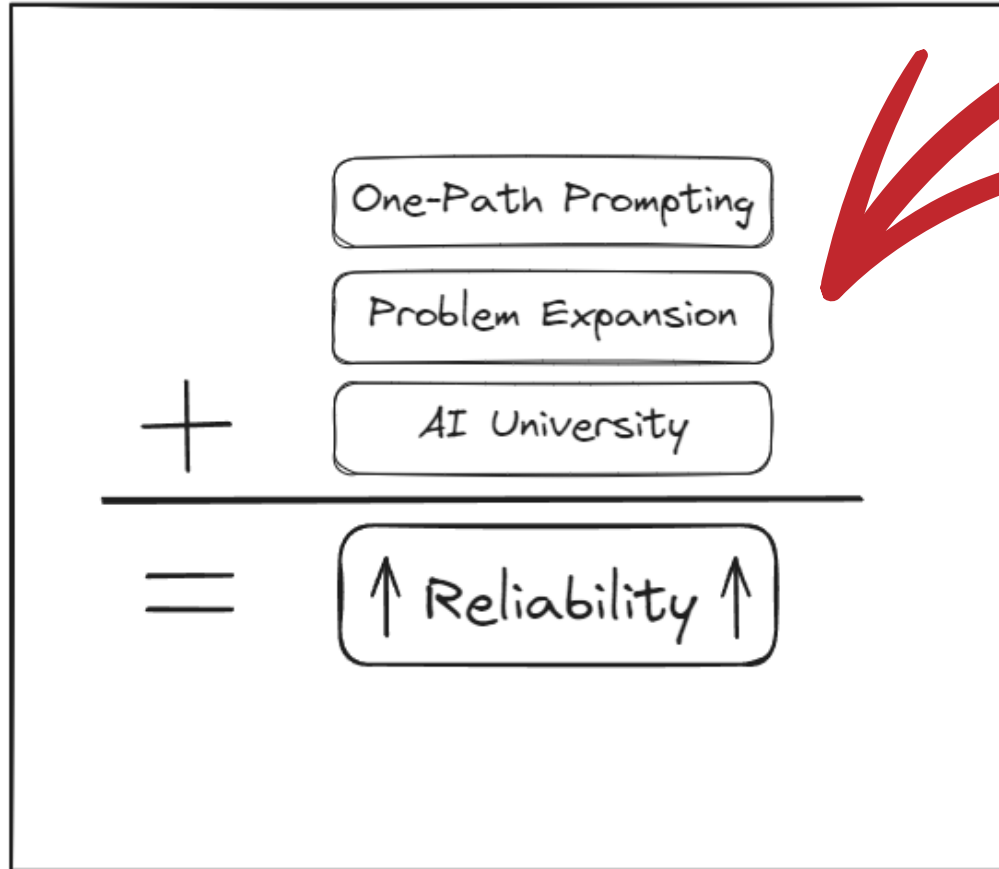


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Reliability Training:



Will AI answer this prompt well?



Hey AI,

I want you to write me a detailed business plan for a \$100M A&E company, write all the ads, write incredible cold-calling scripts, and write the entire website for me. Go.



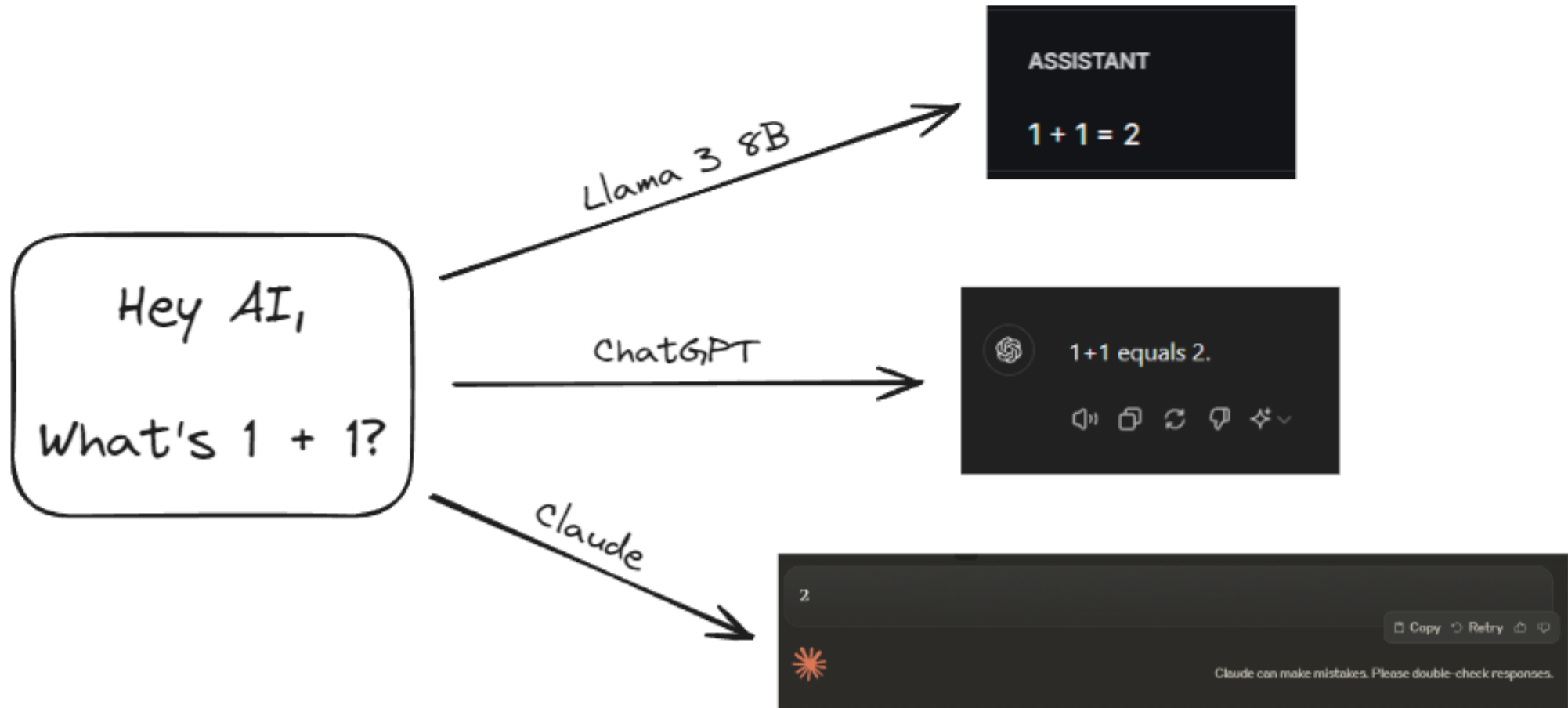
How about this one?



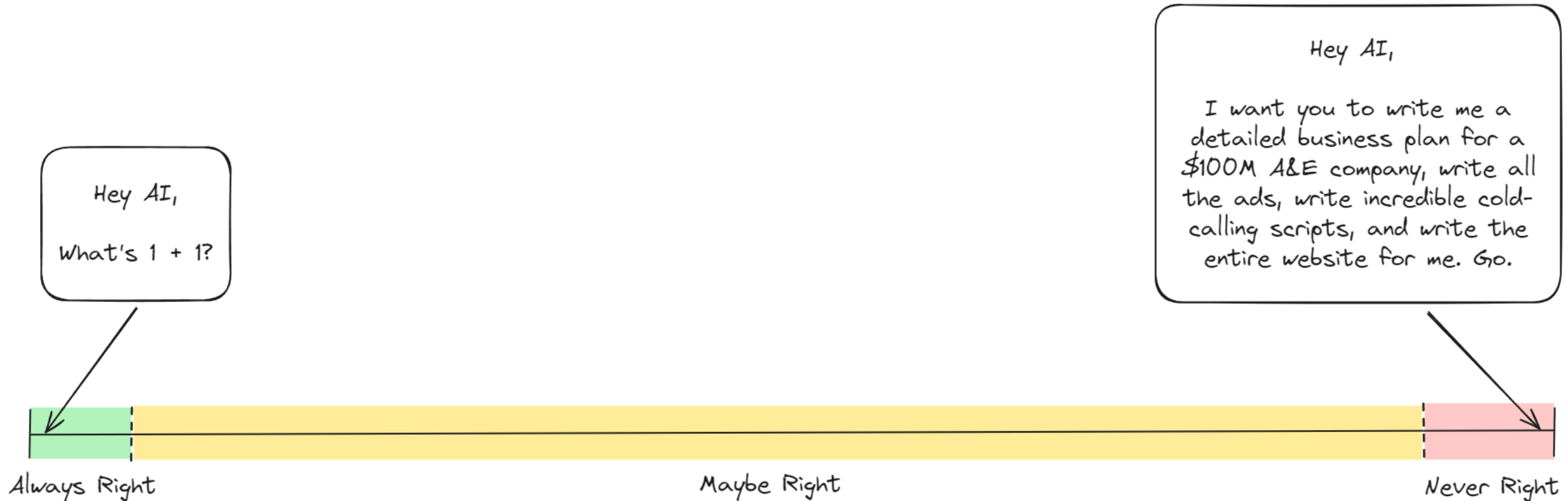
Hey AI,
What's $1 + 1$?



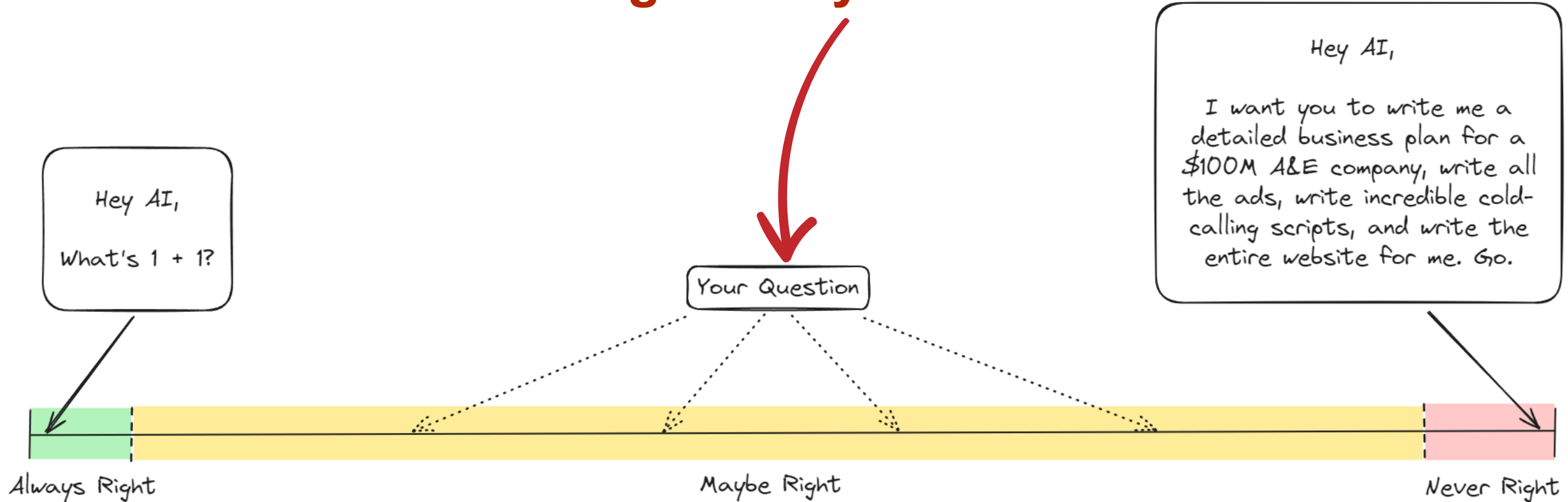
Spoiler Alert: AI always gets this one right:



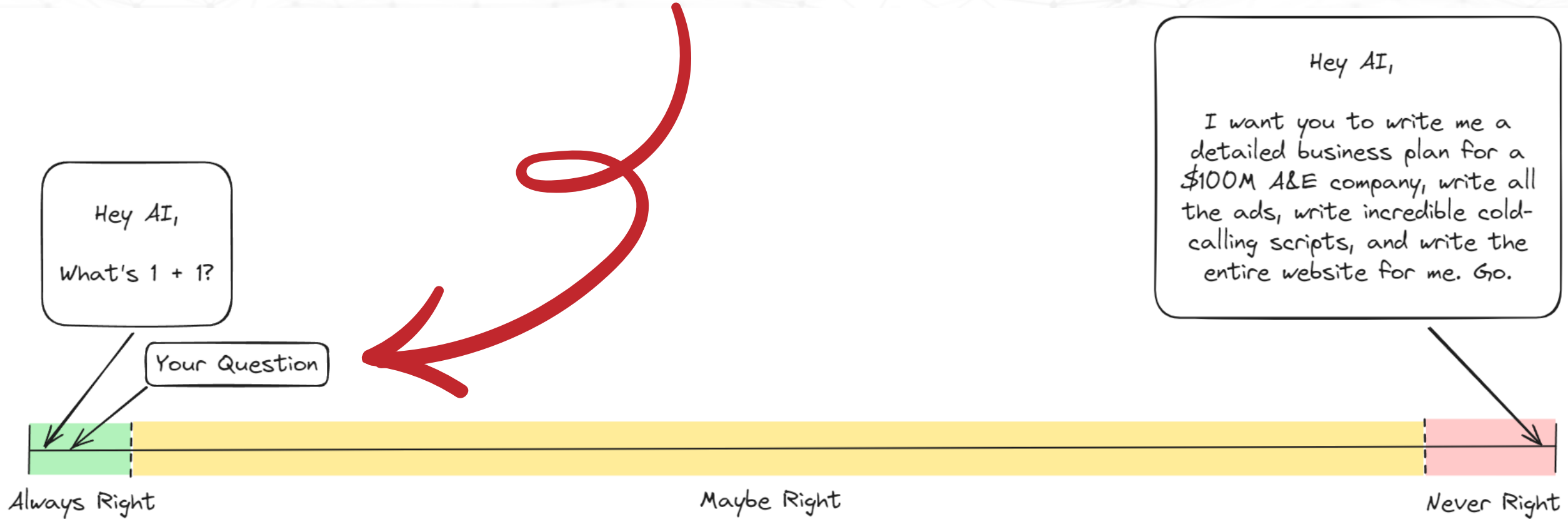
This is the range of skill that AI has to answer any given prompt:



Most questions that we want to answer with AI generally land here:



To make the AI reliable, this is where the question must sit:



3 Techniques that have worked best for me:

1

One-Path
Prompting

2

Problem
Expansion

3

AI
University



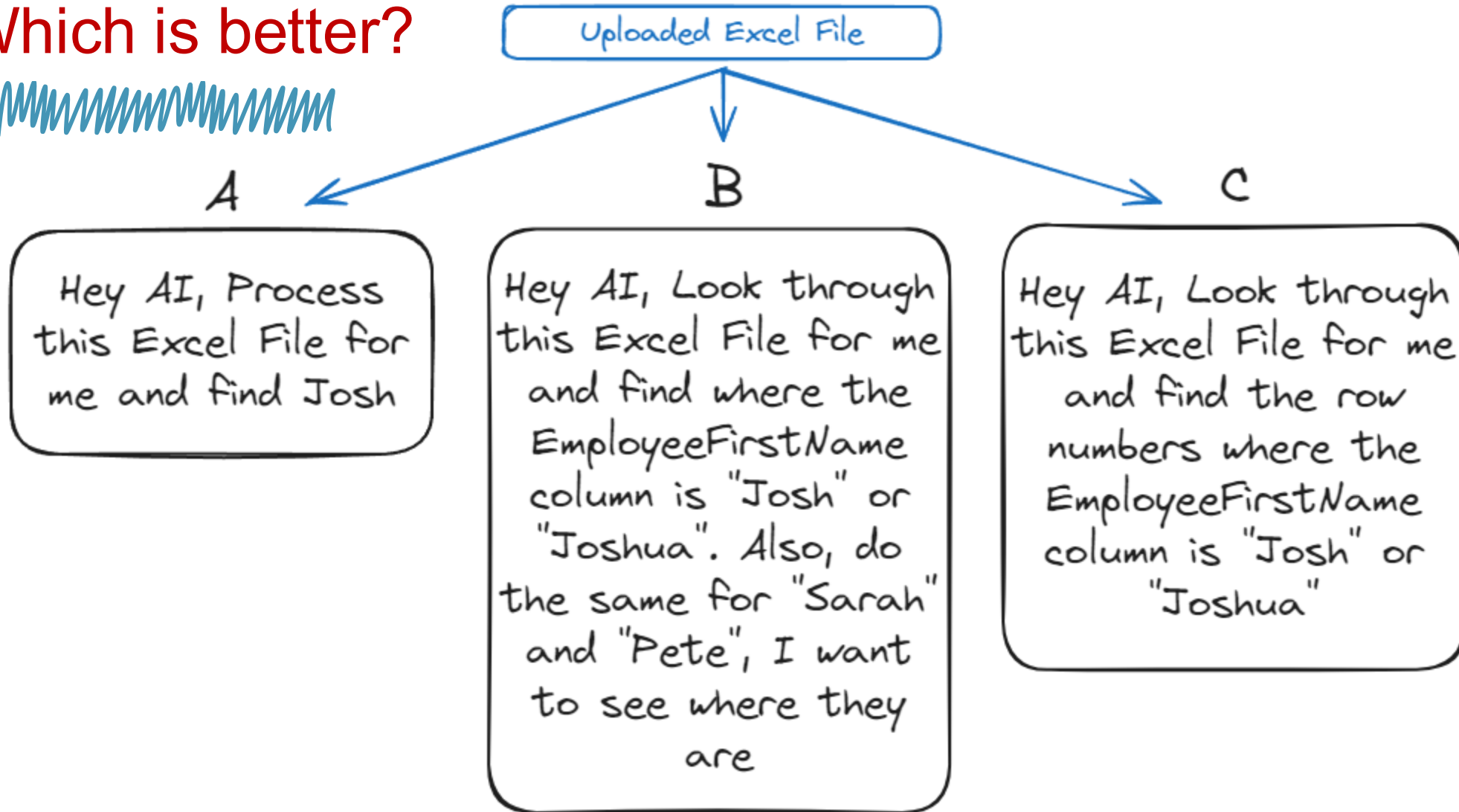
One-Path Prompting



Put simply, when speaking to the AI:

- Remove any conflicting information
- Be as specific as you can
- Ask only one question

Which is better?



C is better



Uploaded Excel File

A

Hey AI, Process this Excel File for me and find Josh

B

Hey AI, Look through this Excel File for me and find where the EmployeeFirstName column is "Josh" or "Joshua". Also, do the same for "Sarah" and "Pete", I want to see where they are

C

Hey AI, Look through this Excel File for me and find the row numbers where the EmployeeFirstName column is "Josh" or "Joshua"



Want more?



Here's a free prompting guide that will go in-depth on the key details if you're using:

OpenAI's



ChatGPT



Anthropic's



Claude

Google's



Recap



Get rid of
contradictions



Don't be vague,
be specific



Ask one
question, not
multiple
questions



2

Problem Expansion

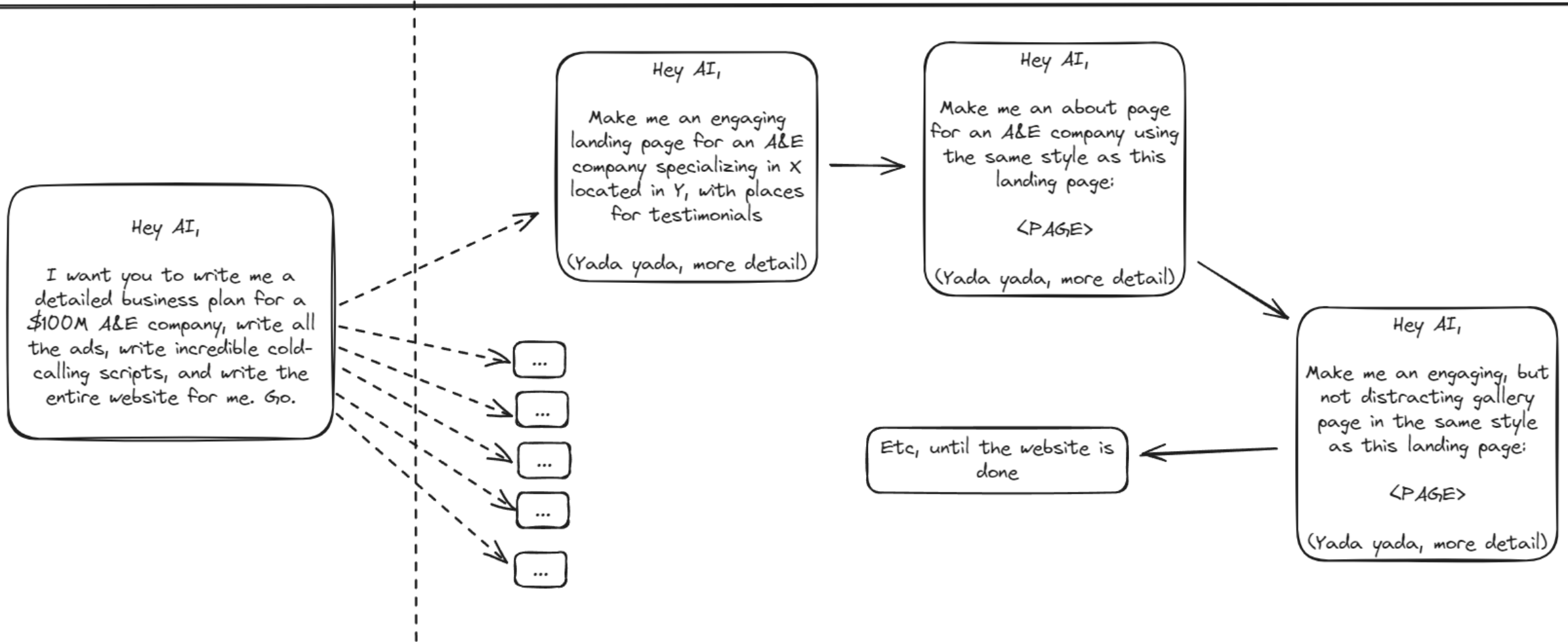


Put simply, turn big problems into a bunch of smaller problems.

Here's an example:

IMPOSSIBLE

BETTER



Recap

- AI can't solve huge problems, but it can solve smaller problems really well.
- A good rule of thumb is to speak to the AI as you would an intern
 - You wouldn't tell an intern to run the company for you
 - You might tell an intern to look through a spreadsheet and find something specific



AI University
(developer only)

**Put simply, train a custom AI that's
really good at one thing**





If AI can't currently solve a specific problem, you can train it to be better.

Recap

If you want to be able to bend AI to your will:



Make your prompts as straightforward as possible




Split big problems up into a bunch of smaller problems

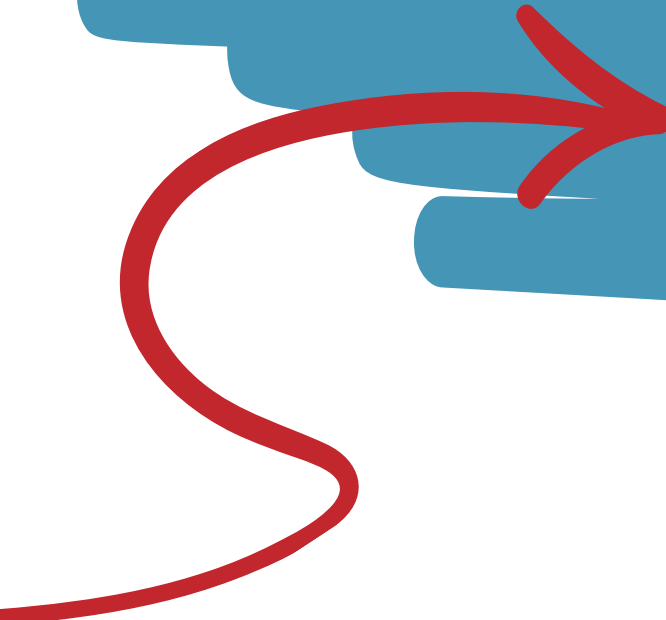

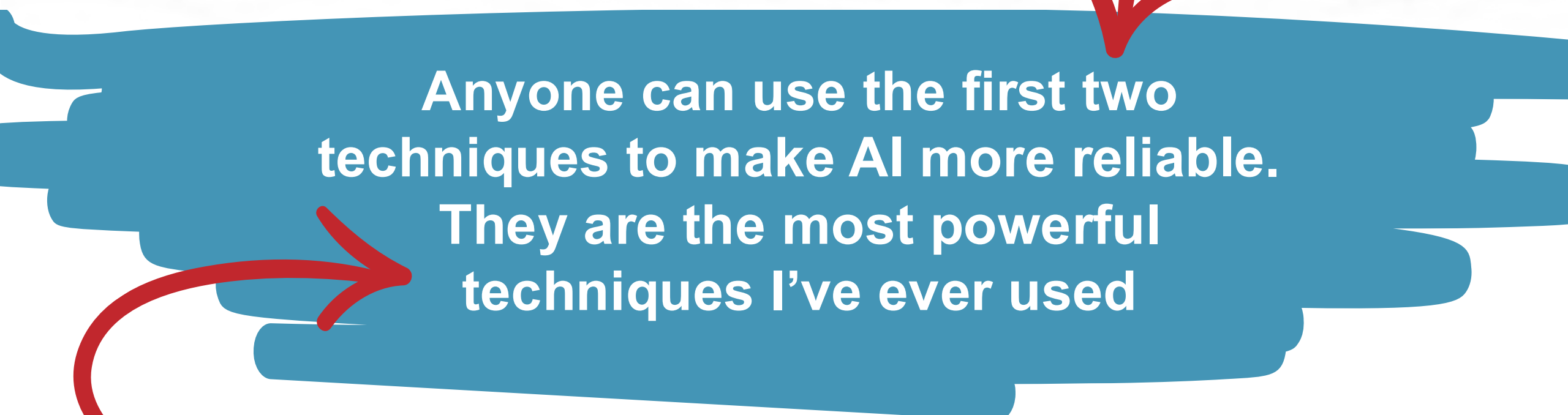


Train a custom AI to be good at one thing

(optional, only if needed)



**Anyone can use the first two
techniques to make AI more reliable.
They are the most powerful
techniques I've ever used**



Recap:

- If AI is going to be useful, it must be reliable
- You can ensure reliability by:
 - Having a window into the facts
 - Training for reliability in 3 ways
 - ✓ One-Path Prompting
 - ✓ Problem Expansion
 - ✓ AI University (*developer only*)
- Reliable AI will save you time and energy anytime you need specific data to make a decision



Questions?

Free Prompting
Guide:



<https://www.fullsailpartners.com/deltek-projectcon-2024-ai-presentation-thank-you>