

# Using AI to Write Workplace Instructions

Use this job aid when drafting instructions for your own workplace. It includes the prompt template and review procedure from the lesson; replace the bracketed text with details about your task and source documents.

## Before writing the prompt

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Gather the following:

- The current policy, procedure, or standard that sets the requirements, including its date.
- Notes or screenshots explaining how to use the system, including their dates.
- Information about what readers already know and what they need explained.
- The name of the person or team responsible for the process.

## Prompt template

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| Goal         | Write step-by-step instructions for [task] in [system or place].                                                                                                                                                                                                     |
| Context      | The readers are [who]. They already know [what they can do] but have never [what is new to them]. [Describe the problem these instructions should address.]                                                                                                          |
| Source       | Use only the attached [document names]. [Policy, procedure, or standard] sets the requirements; if the documents conflict, follow it. Do not add information from elsewhere.                                                                                         |
| Expectations | Write [number] numbered steps in plain language, with one main action per step. After each step, name the document it comes from. If readers need information the documents do not provide, list it under “Questions for [process owner]” rather than filling it in. |

These four elements come from Microsoft’s Copilot prompting guidance.

## Review procedure

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1. **Compare each instruction with its source.** Find the cited passage and confirm that it supports what the draft says, checking specific details such as numbers, time limits, names, and conditions.
2. **Read the sources separately to find omissions.** Work through the document that sets the requirements, finding where each requirement appears in the draft.
3. **Correct errors using the supplied information.** Use the source wording to revise inaccurate instructions and remove unsupported details.
4. **Ask the process owner about unanswered questions.** Explain what information is missing. If readers need the answer to complete the task correctly, get it before sharing the instructions.

This review procedure is the approach taught in the lesson, rather than an official Microsoft or CIPD framework.