



H A N D S - O N T R A I N I N G · O N E D A Y · 8 C P E C R E D I T S

The AI-First Professional

Become the AI-fluent professional your team needs.

◆ THIS CLASS AT A GLANCE

AI is changing how work gets done — and the professionals who learn how to use it well are the ones who will lead the next decade. In one focused day, you will go from curious to capable, applying AI to the real tasks that fill your week.

- Understand how LLMs really work: tokens, temperature, hallucinations
- Master prompt engineering — Role-Based, Few-Shot, Chain-of-Thought
- Apply AI to real business tasks: emails, reports, meetings, decks
- Use AI to interrogate PDFs, Word docs and unstructured data
- Build personal AI workflows that compound over time
- Navigate ethics, copyright, privacy and policy traps

E X C E L E X P E R T S

dfwexcel.com · 817-841-9560

The AI-First Professional

C O U R S E O V E R V I E W

AI tools like ChatGPT, Claude and Gemini are now everywhere — but most professionals are still using them like a Google search box. There is a much bigger gap between AI users and AI-fluent users than people realize.

This class bridges that gap. You will spend the day with real prompts, real workflows, and a structured framework for getting business-ready output from AI — without falling into the common traps.

HOW WE TEACH

Your instructor is a working professional, not a presenter reading from slides.

Public classes have up to 6 students for maximum individual attention. Private team training scales to fit your group, however large.

Every concept is taught, then immediately practiced. You leave with the muscle memory, not just the notes.

WHO SHOULD ATTEND

Professionals who want to level up their daily work with AI, not just experiment with it.

Team members who want to accelerate common business tasks using AI.

Anyone tired of generic AI output and ready to write prompts that actually work.

Teams that need a shared, responsible AI literacy across the organization.

WHAT YOU TAKE HOME

- Printed class binder with step-by-step labs and challenge exercises.
- Exercise files and prompt library — 1-year access included.
- Certificate of completion plus 8 CPE credits (TSBPA accredited).

C L A S S E S S E N T I A L S

Level: Beginner

Format: In-person classroom or live online (always a live instructor)

Duration: 8 hours — 9:15 AM to 5:00 PM

Tuition: \$495 · includes all materials

Locations: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver · Live Online

Credits: 8 CPE credits — accredited through the Texas State Board of Public Accountancy

The AI-First Professional

PROGRAM AGENDA — DETAILED COURSE OUTLINE

PROGRAM AGENDA

1. AI Foundations

- **What is Generative AI:** the big picture in plain language
- **LLMs explained:** how Large Language Models actually work
- **The AI ecosystem:** ChatGPT, Claude, Gemini and how they differ
- **Tokens, temperature, Top-P:** the settings that change AI output
- **Hallucinations:** why AI lies and how to catch it
- **The future of AI at work:** where this is all heading

2. Prompt Engineering Masterclass

- **Anatomy of a perfect prompt:** the components that drive great output
- **Role-Based prompting:** telling AI who it is before you ask
- **Few-Shot vs. Zero-Shot:** when to give examples and when not to
- **Chain-of-Thought:** asking AI to show its reasoning
- **Iterative refinement:** the workflow that gets you to a great answer
- **Business prompt templates:** ready-to-use patterns
- **Handling ambiguous queries:** narrowing focus when AI rambles

3. Everyday Business Tasks

- **Email & communication:** drafting, summarizing, replying
- **Reports & summaries:** turning notes into polished output
- **Meeting transcripts & action items:** AI as your note-taker
- **Social media & content:** drafting at the speed of thought
- **Translation & localization:** working across languages
- **Brainstorming & strategy:** using AI as a thinking partner
- **Project management:** AI for planning and tracking

4. AI + Documents, Data & Analysis

- **PDFs and Word docs:** letting AI read for you
- **Extracting structured data:** from unstructured text
- **AI-powered data cleaning in Excel:** from messy to tidy
- **Natural-language data queries:** asking your data questions
- **Trend analysis & forecasting:** AI as an analyst
- **Charts with AI assistance:** from data to visual in seconds
- **Data privacy & security:** what is safe to paste into AI

5. Personal AI Workflows

- **Identifying automation opportunities:** where AI saves the most time
- **Mapping your daily workflow:** finding the AI insertion points
- **Connecting AI to your toolstack:** where AI lives in your work
- **Custom instructions & GPTs:** AI that knows your context
- **Multi-step AI processes:** chaining prompts into a workflow
- **Automating decisions:** where AI can take the wheel
- **Saving & scaling great prompts:** your personal prompt library

6. Navigating Pitfalls & Ethics

- **Verifying AI output:** trust but verify, every time
- **Bias & fairness:** what AI gets wrong and why
- **Copyright & IP:** what AI can and can't legally produce
- **Public cloud data privacy:** what stays private and what does not
- **Organizational AI policies:** working within company guardrails
- **The human in the loop:** where judgment still belongs to you



A L T E R T O Y O U R M A N A G E R

Use this template to request approval. Customize the bracketed parts and send.

Dear [Manager's Name],

I would like to request approval to attend the AI-First Professional class offered by Excel Experts. It is a one-day, hands-on class that will give me a structured, practical AI foundation — exactly what I need to accelerate the work I do on [team / project / report name].

What I'll bring back to the team

- **AI fluency, not novelty** — the structured skill set to use AI for real work.
- **Prompt engineering** — the techniques that turn AI from random to reliable.
- **Everyday workflow wins** — email, reports, meetings, decks — all faster, all sharper.
- **Document and data analysis** — extracting insight from PDFs, Word docs, and messy data.
- **A responsible AI framework** — I can use to share what is safe and what is not with the team.

Why this class specifically

- **One full day** — no multi-week commitment; minimal disruption to my workload.
- **Designed for business professionals** — no coding background required.
- **Taught by a working professional** — not a recorded video or a generic presenter.
- **Small public classes (up to 6 students)** — or live online if travel is a concern; private team training is also available.
- **8 CPE credits included** — accredited through the Texas State Board of Public Accountancy.

The investment

- **Tuition:** \$495
- **Time out of office:** 1 business day
- **Included materials:** printed class binder, exercise files and prompt library (1-year access), certificate of completion

I expect to recover the time investment within the first few weeks just by accelerating recurring tasks with AI — and I will be able to share what I learn with the rest of the team.

Class details and online registration: dfwexcel.com/the-ai-augmented-professional-class/

Questions: 817-841-9560

Thank you for considering this. I would appreciate your approval to enroll.

Sincerely,

[Your Name]

REGISTRATION

Enroll Today!

Online: dfwexcel.com

Phone: 817-841-9560

Price: \$495

Format: In-person classroom or live online

Cities: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver

TRAIN YOUR TEAM

Bring Excel Experts to your office:

- Private group training on your schedule
- Tailored to your team's industry and data
- On-site, at our classrooms, or virtual
- 1-on-1 coaching also available

dfwexcel.com/excel-experts-train-your-team/