PacificCPE

COURSE

60352A

ChatGPT in Practice: Work, Life, and Beyond

Ready to put ChatGPT to work? Building on the basics, this course explores how accounting and tax professionals can apply AI tools in real workplace scenarios, from drafting communications to streamlining everyday tasks. You'll also discover practical ways ChatGPT can help outside the office, plus a look at more advanced features and capabilities that go beyond the fundamentals. If you want to move from understanding ChatGPT to actually using it effectively, this course will help you get there.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 8

Start Course ↓

Final Exam Copy ↓

LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 8 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recognize business uses for ChatGPT.
- Recognize how ChatGPT can be effective in our personal lives.
- Recognize other AI tools currently available.

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Chapter 1: AT WORK

Chapter Objective

After completing this chapter, you should be able to:

- Recognize business uses for ChatGPT.

"My mind is officially blown," said my friend Mei when we met up for a coffee. "Have you heard of ChatGPT?"

Mei leads a marketing and customer experience team in a fast-moving consumer goods organization that sells beauty products. She relayed the following story to me about a meeting she had with her team in early March 2023.

> Just as we were about to start, one of my team members, Kim, asked if it would be okay to record the meeting, as he wanted to show me a way to make them more productive using ChatGPT.
>
> To be honest, I really just nodded distractedly, but I checked if everyone was okay to record the meeting. As usual, there was a lot to cover, a lot of discussion with everyone wanting to have their say.
>
> I was madly making notes, as was everyone else, and I could see all our notepads filling up. Usually, after our meetings, we organize our thoughts, figure out what needs to be done and dump it in our Teams channel. On a good day, this can take hours as we usually have back-to-back meetings and then there's all the back and forth because we rarely agree on who said what.
>
> Five minutes before we were due to finish, Kim interrupts and says, "Let's wrap this up." Unbeknownst to us, Kim wasn't just recording the meeting, he was also using a transcription app, so while we all watched, Kim copied the transcription from his phone to his laptop. What happened next was like magic.
>
> Kim opened ChatGPT and typed the following prompt: "Summarize the following notes into actionable bullet points," and then he pasted the transcription in. Before our eyes, the transcription became notes that were organized and comprehensive, capturing every point and identifying action items.

> Then he typed: "Our priorities are to improve customer experience. Pull out specific actions associated with any agreed dates or task owners mentioned in the original transcript." Bang! We had five prioritized actions, three of which had deadlines we'd discussed and two had names against them. All of this took under two minutes. All we needed to do in the end was add dates and owners to the remaining actions.
>
> We are using ChatGPT in all our meetings now. It's completely changed how we work for the better. We are having better-quality conversations, focused on each other rather than scribbling notes, and can give our full attention to the topics at hand.
>
> As we got better at it, we started saying words like, "Action! John will get XX done by 31 June," which made it easier for ChatGPT to pick up specific actions.

I think it's legitimate that Mei's mind was blown. Don't you?

And, another wee reminder to be cautious about sharing anything commercial, confidential or under copyright with ChatGPT.

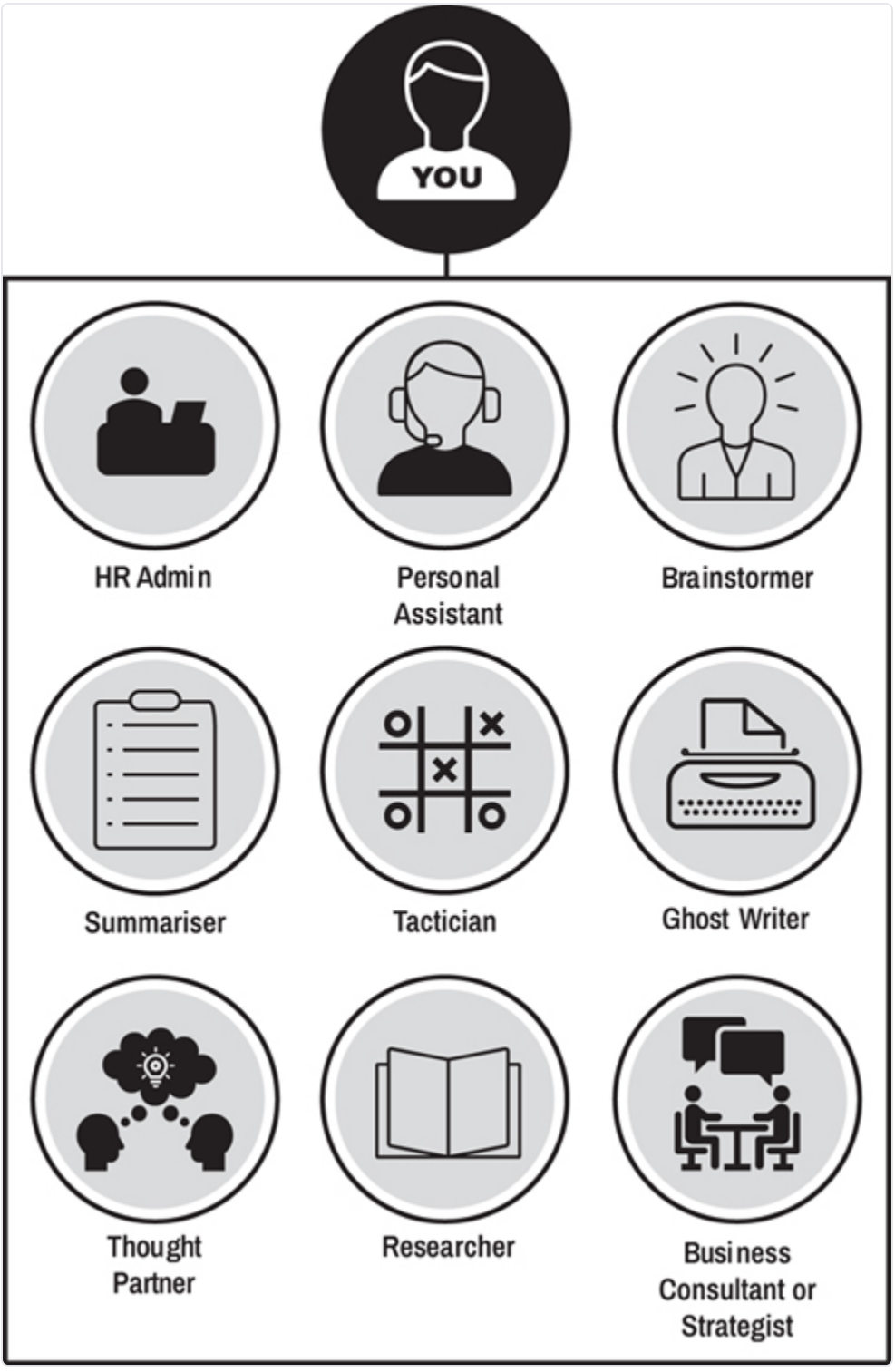
This is just one way that ChatGPT can help us with some of the time-consuming, mundane and tedious tasks at work. This team is now able to focus on completing their assigned tasks or move on to their next meeting without having to spend hours deciphering notes or trying to figure out who is supposed to do what.

If you're like me and many others, you're probably struggling to balance your work and personal life. With the ever-increasing demands of work, it's easy to get lost in the daily grind and forget about the important things in life. With the help of ChatGPT, we can find ways to be more productive and get more done in less time.

"Impossible," I hear you say. Let's look at how people are already using this amazing tool at work to do more with less (summarized in Figure 4.1).

What kind of admin support could you use with your work?

FIGURE 4.1: YOUR VIRTUAL TEAM



THE VIRTUAL HUMAN RESOURCES ADMINISTRATOR

My business owner friend was on the hunt for a new executive assistant, and it had been a while since he had gone through this process — about three years, to be exact. But as he quickly discovered, a lot had changed in those three years. With virtual and hybrid working conditions, new technologies, and the evolving nature of their business, updating the job description and finding the right candidate was challenging.

To make matters worse, my friend realized that their current employee manual was completely out of date. In the past, he relied heavily on this as a tool to bring new people up to speed as quickly as possible.

As he worked through the lengthy and tedious process of updating the job description and briefing the employment agency he was using, he felt frustrated and overwhelmed by the amount of time and effort it was taking.

That's when I suggested he use ChatGPT to help with the process. My friend was initially skeptical — he had never heard of ChatGPT and had no idea where to start. After I explained how ChatGPT worked,and how it could quickly generate a new job description, write a brief, design interview questions, and even update the employee manual, he was intrigued. He also had nothing to lose.

Whe n I said, "And you could do all of that in a matter of minutes," he nearly spat his coffee out.

Here are the prompts I suggested he try:

- Update the following job description for an executive assistant incorporating changes to work since 2019, including virtual, hybrid and any other technologies relevant to being the executive assistant to a small business owner.
- Write a brief for a recruitment agency using the above job description.
- Provide recommendations for interview questions for this role.
- Given the changes to this job description, update the employee manual, highlighting areas that need my input.

THE VIRTUAL PERSONAL ASSISTANT

There have always been times when I wished I had an assistant to help me with my day-to-day admin, leaving me free for more high-value activities like managing client relationships, winning new work and engaging with my stakeholders.

I would have them doing things like:

- **Drafting emails:** Writing effective emails can be challenging and time-consuming, especially when you need to communicate important information or make a good impression. ChatGPT can help you with suggestions for how to word an email, how to structure the email and how to sign off.

Example prompt: “Write a professional email to my boss requesting a meeting to discuss my performance.”

- **Proofreading:** Whether it’s a book like this, a presentation or a proposal, our documents need to be as error-free as possible. ChatGPT can review and correct grammar and spelling errors in text.

Example prompt: “Proofread this report to ensure that it is free of spelling and grammatical errors.”

- **Starting:** When it comes to beginning just about anything, it can be challenging to just get those first few words into a document, proposal or presentation. Tell ChatGPT what you need (even vaguely) and see what it suggests. It may be just the inspiration you need to get going.

Example prompt: “I need to write a proposal to a new client. How would you suggest I structure it?”

THE VIRTUAL BRAINSTORMER

This is a great feature of the technology that can really help you when you’re feeling stuck or unsure of where to start on a piece of work.

Let’s say you’ve been assigned a project by your boss, but you’re not quite sure what direction to take it in. You could spend hours researching and brainstorming on your own, trying to come up with ideas that will impress your boss and make the task a success. Or you could call several meetings involving a number of people and use up a pile of hours to “brainstorm ideas.” Before succumbing to that, try asking ChatGPT.

Simply input a question, a statement or even a few keywords that describe the task at hand. For example, you could use the prompt, “What are some innovative ideas for our new product launch?” or “How can we make our company’s website more user-friendly?”

Once you’ve input your prompt, ChatGPT will generate a list of ideas for you to work with. These ideas can be anything from simple suggestions to more complex strategies. The best part is that you can generate as many ideas as you need until you find one that really resonates with you.

Instead of spending hours trying to come up with ideas on your own, you can use ChatGPT to generate a list of potential ideas in just a few minutes.

This can help you get started on your work faster, and avoid wasting time on ideas that might not be feasible or relevant.

Once you have narrowed down some ideas, you then can get the best out of meetings with your colleagues to evaluate them and come up with a plan. The hard and tedious work has been done.

Of course, it's important to remember that not all the ideas generated by ChatGPT will be winners (like when people brainstorm). Some of the ideas might not be relevant to your project or might not be feasible to implement. That's why it's important to use your own judgment and critical thinking skills to evaluate the ideas and decide which ones are worth pursuing.

And there it is: we still need humans. Your job is safe.

> **Example prompts:** What are some ways that we can improve employee engagement and morale in our workplace?

Can you suggest some team-building activities that we can do virtually?

One of our biggest clients has expressed dissatisfaction with our services. How can we address their concerns and improve our relationship with them?

THE VIRTUAL SUMMARIZER

Remember all those times you have had piles of reports or articles as pre-reading for a meeting, but you didn't have the time to read each report in detail, so you scanned it quickly trying to absorb all of the information and key points? Then remember how you showed up to the meeting and kind of bluffed your way through it?

Bluff no more. Now you can use ChatGPT to summarize the text for you.

All you need to do is copy and paste the text into the prompt box (being mindful of the commercial and confidential nature of the work) and ask it to summarize the content for you. This could be a single article, a report or even chapters of a book. ChatGPT will then generate a summary of the content including the most important points and key takeaways from the text, allowing you to quickly understand the main ideas without spending hours reading the entire document.

Of course, it's important to remember that the summary generated by ChatGPT might not capture every detail of the text. If it's critical data and you need a detailed understanding of the information, it's a good idea to read the original text in full.