

Content Map:

RISE course: Accelerating Marketing Analysis with AI

SAMPLE TOPIC	
What is the training topic?	Are you the subject matter expert (SME) or did you select a topic from Source Content?
Increasing productivity with AI when conducting complex marketing projects.	Yes, I'm the subject matter expert.

DEFINED BUSINESS GOAL AND PROBLEM
Define the business that your sample relates to: What type of business is it? What industry is it a part of? What is the name of the business (fictional or real, if volunteering for a real company)?
The fictitious alias of this company is SageFlow Marketing. It is a marketing consulting firm that specializes in go-to-market strategies and audience discovery/market research.
What is the business goal for this training? What does success look like for the company?
SageFlow's Marketing consultants will be able to utilize AI to achieve a 50% productivity gain in the production of marketing proposals while maintaining adherence to our established quality standards.
What is the business problem (gap) that, when solved or closed, would help the organization reach the above goal? In other words, WHY is the goal not being met right now?
Our marketing consultants are only achieving an 18% gain in efficiency when working with AI on marketing projects. Outside consulting indicates that this is likely not an issue with AI capability, but rather with the lack of knowledge and skill among our consultants to effectively prompt and direct AI in complex reasoning tasks.

AUDIENCE
Who are the primary learners (audience) that will be taking the training? Be specific.
They are marketing consultants who are assigned to client engagements. They assist clients by analyzing their challenges, conducting research, and proposing solutions.
What are the basic demographics of your primary learners?
These are corporate marketing professionals, most with business and marketing degrees and significant industry experience.
What are your learners' prior knowledge/skill level?
The majority of these learners are strong in web-based research and problem-solving, but developed these skills prior to the AI era. They are tech-savvy but are not adept at integrating AI into their workflows.
(Current State) What is currently happening with the target audience that needs to change? Before learners take your

training, what are they doing, or not doing successfully?
SageFlow's marketing consultants have access to AI tools, but are seeing low productivity gains in the development of marketing proposals. (18% overall). Surveys indicate that most use AI only for routine tasks. They need to learn how to apply AI to accelerate the more complex work of problem-solving, analysis, and research needed to produce quality marketing proposals.
(Future State) What should the target audience be doing? Once learners complete the training, what should learners be able to do successfully?
Sageflow Marketing analysts should be able to successfully integrate AI into their full workflow and achieve a 50% productivity gain while maintaining our company's usual quality standards.

CONTENT OUTLINE				
ACTIONS NEEDED TO MEET GOAL				
Directions	Action 1:	Action 2:	Action 3:	Action 4:
<i>List all of the actions that a learner would need to take for the business goal above to be achieved.</i>	Marketing consultants will establish an information-rich context folder for the AI to access BEFORE prompting begins.	Marketing consultants will apply effective prompting strategies as they partner with AI in the analysis process.	Marketing consultants will implement procedures to keep AI from getting bogged down in context as conversations grow long.	
Directions	How Action 1 ties to the business goal:	How Action 2 ties to the business goal:	How Action 3 ties to the business goal:	How Action 4 ties to the business goal:
<i>State HOW these actions tie back to the business goal.</i>	Doing prework to establish context for AI saves a significant amount of time over	Effective AI prompting enhances productivity not only by reaching quality results faster,	AI has a limited context window for each conversation, and tends to get bogged	

	creating the same shared understanding through conversational prompting. According to our consultants, this practice alone significantly jump-starts the productivity gains we hope to achieve.	but also by reducing the load on AI's conversational context window, keeping its responses sharper and more relevant.	down during long interactions. Significant time savings can be achieved by learning how to recognize the signs of context window overload and how to create summaries to hand off to a new context window.	
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LEARNING OBJECTIVES				
Directions	Terminal LO 1:	Terminal LO 2:	Terminal LO 3: (optional)	Terminal LO 4: (optional)
List all of the terminal learning objectives (LOs) that the learner will need to achieve to meet the business goal. Your sample should have 2-4 terminal LOs. Each LO should connect with the action that is in the corresponding column above.	T1. Construct an initial context folder to help AI understand the context, overall requirements, and constraints of a marketing consulting project.	T2. Implement the specific smart prompting techniques.	T3. Formulate a context handoff plan for an AI that is getting bogged down in context.	
Directions	Are there any enabling LOs that support terminal LO 1? (optional)	Are there any enabling LOs that support terminal LO 2? (optional)	Are there any enabling LOs that support terminal LO 3? (optional)	Are there any enabling LOs that support terminal LO 4? (optional)
If there is an enabling LO that supports the terminal LO, list those here. Not all terminal LOs may have a supporting	E1. Outline the key components needed to help AI establish context for a marketing consulting project.	E2. Identify the four techniques of smart prompting used to generate initial output.	E3. Describe two key techniques used to keep the ongoing context manageable for AI on long projects.	

<i>enabling LO. Terminal LOs may stand on their own but enabling LOs should not.</i>	This will be verified in a knowledge check.	E2.1 List the two key techniques used to improve unsatisfactory AI output. These will be verified in a knowledge check.	This will be verified in a knowledge check.	
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Directions	Subtopic 1:	Subtopic 2:	Subtopic 3 (Optional):	Subtopic 4 (Optional):
<i>List the subtopics (categories of chunked content) in a meaningful order.</i> <i>Each subtopic should connect with the LO and the action that are in the corresponding columns above.</i>	The ideal contents of a project context folder: What to include in a AI enabled project's initial context folder, and why it should be included.	Smart prompting techniques are needed to: 1. Initiate the project, work through project phases 2. Troubleshoot unsatisfactory output from AI.	How to recognize the signs that the AI context is getting too large. How to create the handoff and restart a new informed conversation.	
Directions	Information / details:	Information / details	Information / details	Information / details
<i>Outline the information that each subtopic will cover. Avoid going beyond the scope of the LOs. Only include info that is needed to achieve the LOs. This section needs some detail, not just a couple of words.</i>	The importance of establishing context: Just like a human new to a project, AI needs relevant, detailed information about the context of a project before it engages with the work. It needs to	How to effectively prompt AI: Begin by asking AI to review the project folder and state its understanding of the project. Example: "Please	As you perform ongoing work with AI, your conversations may span thousands of lines, and AI will begin to struggle to keep all of this conversational context current.	

<i>Example: If your content involves 5 steps of a process, you must write out all 5 steps. If it's three characteristics, all three characteristics must be named.</i> <i>The information should connect with the action, LO's, and subtopic listed in the corresponding columns above.</i>	develop a shared understanding with you as the marketing analyst as to the needs, goals, processes and standards of the project. You can establish this context through a conversation with AI, but many of our projects are complex, and this can be a lengthy process. It is easier and more efficient to create a project folder that AI can read to establish the project context. What to include in the initial project context folder: An initial project folder should provide everything that AI needs to understand the client's problem and goals, the type of analysis Sageflow has proposed, and the SOPs and quality standards that need to be followed. The folder should be created on the analyst's shared drive, under /Marketing/Projects/ClientName/ProjectNumb	review the project folder located in /Marketing/Projects/TerraTrack/P101. Begin with the readme file. Summarize your understanding of the project for my review, and ask any questions.” The AI will create the summary. Review it, and work through any questions the AI asks. Then create smart prompts to do the work: Smart Prompting Technique 1: Work with AI one step at a time. 1. Choose a specific step of work to address with AI. Typically, this will be no more than one phase in an SOP. AI does better when large problems are broken down into a series of smaller problems. Example Prompt. Part I: “Let's start the competitive analysis phase of the go-to-	When you begin to notice longer response times, increasingly inaccurate responses, and messages about high AI usage. It is time to refresh the AI context. You do this by Summarizing the current AI conversation and handing this summary off to a fresh AI conversation window. Steps: 1. Ask AI to create a document summarizing everything you've discussed so far. Make it clear that this document will be handed off to a new AI conversation. 2. Review and verify the summary document. As you've worked with AI in this session, you've made decisions and refinements. You want to make sure that these are represented in your summary. 3. Put the document in your initial project folder in a subfolder	
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	er The specific documents to be included are: Item #1: The project's Discovery Brief. This document was created in conversation with the client and outlines the client's business problems/goals, as well as SageFlow's recommended research approach. Example: InnoDevices wants a Market Opportunity Assessment for a new smart wristband worn to conferences and events. The Discovery brief outlines the problem (they need to know if there is a market for this), as well as the recommended research approach (a Market Opportunity Assessment). Why this is important: The Discovery Brief will help develop a shared understanding about the client, the business problem, and the general approach being taken.	market SOP. We are going to compare major event planning software products and see what features they offer. (so far, this prompt is naming a specific work phase, definite the process, and establishing an overall goal.) Smart Prompting Technique 2: Give specific instructions that describe the action, state the purpose, and set expectations. . Example Prompt. Part II: View the websites for these event planning software companies: tarafish.com, startoro.com, and planitblue.com. Examine their advertised features and create a comparison chart identifying no fewer than eight key features. I've attached our SOP for creating comparison charts, please follow that process.	called "AI Conversation Handoffs". 4. Restart a new AI conversation. Point AI to the initial project folder and the AI Conversation Handoffs folder for context. The AI will reset Knowledge check 3.1: What are the signs that your AI might be at the limit of its context window? (Check all that apply) Check all that apply. A. Slower responses. (correct) B. Less accurate responses. (correct) C. Increased AI usage (correct) D. The AI automatically switches models (incorrect) Response to incorrect answer: In our environment, we already use the most capable model from our provider.	
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	Item #2. The SOP documents for the type of analysis we are conducting. (Examples of our SOPs include Market opportunity assessment, Developing a go-to-market plan, Audience Discovery Analysis). Why this is important: AI will now have a shared understanding with you about the step-by-step processes that SageFlow follows to deliver a solution to a client. Item #3: Sageflow's "Quality Standards" document. This document outlines targeted depth of analysis, general formatting expectations, tone and professionalism, and the definition of "complete" for a work product. Our quality standard document can be found on the shared drive under /SageFlow Standards/qualitypromi se.docx	(The prompt is clearer because it specifies the action, refines the purpose, names the information sources, and sets expectations.) Smart Prompting Technique 3: Be precise about your output requirements, and provide examples. Example Prompt. Part III: Create a three-column comparison chart with the products across the top and at least eight features down the left side. I am uploading a sample comparison chart here. Please follow the format and style for both content and presentation. (The prompt is improved because it has a definite output with an example to follow.) Smart Prompting Technique 4: Assign AI an imaginary role to help it better refine the output. (Prompt continues:) As you create this	Knowledge Check 3.2 What should be done with summary/handoff document that you ask AI to create? A. It should be uploaded in the next chat window (incorrect) B. It should be added to the project documentation for the next conversation to reference. (correct) C. It should replace all of the documentation in the initial context folder. (incorrect) Responses to Incorrect answers: A: Though this could work, it is better to put the summary in the project folder and made available with that folder for the next project. C: This summary does not replace all project documentation. It continues the conversation.	
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	Why this is important: AI will make guesses about quality priorities unless they are specified. Sageflow maintains an ethos of prioritizing thoroughness over speed. It is important that AI has this shared understanding so it can operate in the same way. Item #4 (If possible) If available, a quality sample of a completed project in the same category will help further set a performance and format expectations for AI. Note: If an optimal example is not available, it is best to exclude it. The SOP and quality standards can manage this on their own. Item #5: A “readme” file that orients the AI to the contents of the project folder and briefly states the purpose of each document:	comparison chart, imagine that you work for a project management trade journal and that you are creating this chart for your audience. Be sure to include all relevant features that would help them make the best decision. (The prompt is improved because it enables the AI to shape its work by taking on the perspective of a journalist/researcher).. Techniques to deal with unsatisfactory output: Sometimes AI will return output that technically meets your request but misses the mark. When this happens, resist the urge to start over. Instead, identify specifically what's wrong and tell AI to fix it. Corrective prompting: Technique 1: Define the criteria being compromised, and direct AI to rework.		
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	Example: README - Project Context Folder Client: InnoThings Project: Market Opportunity Assessment – Product: BandyLoop Before beginning any work on this project, please read the following documents in order: 1. Discovery Brief (discovery_brief.docx): Outlines the client's business problem, goals, and SageFlow's recommended research approach. 2. SOP: Market Opportunity Assessment (sop_market_opportuni ty.docx): Step-by-step process SageFlow follows to conduct this type of analysis. 3. Quality Standards (qualitypromise.docx): SageFlow's standards for depth, formatting, tone, and completeness. Thoroughness is prioritized over speed. 4. Sample Completed Project (sample_moa_greenleaf ery.docx): A previous	Imagine you've received the product comparison chart, but the features listed are surface-level (ie. "event creation" and "calendar view" The chart isn't going to help. Example prompt: "This comparison chart focuses on basic, standard features. Please revise the chart to focus on advanced features like AI- powered scheduling or integration with third- party tools like CRMs. Keep the same format but replace the generic features with these more advanced comparison points." Corrective Prompting Technique 2: Ask AI to play a role, to evaluate the output from another perspective. Imagine you are an event planner examining this chart to choose a product for planning a 500-person corporate conference.		
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	Market Opportunity Assessment for reference on format and depth expectations. If you have properly created your context folder you have: Created a shared overall understanding with AI about the project definition, goals, processes, and standards. You could have done this through prompting/conversations with AI, but it likely would have taken hours and not achieved the same result. Ultimately, this context helps AI serve you with better accuracy and efficiency throughout the project. Knowledge Check: Which of the following are reasons to establish a rich context for AI before the project begins? A. It creates a shared	What features are missing that would be helpful? Are there any features on this chart that wouldn't matter to you? Revise the chart based on your evaluation." Knowledge Check 2: Match the following prompts to the associated smart prompting techniques A. Imagine you are the client taking this survey. What would your opinion be of the clarity and relevance of these questions? B. "I'm uploading an example of an effective survey we did last year for a similar client. Let's use it as inspiration for the creation of this survey. C. We want no more than 10 questions on this survey with no more than 7 being in		
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	understanding about the project definition, goals, processes and standards. (correct) B. It makes it possible for AI to do the work with a single prompt. (incorrect) C. It saves the marketing analyst a lot of time vs. explaining the context through a series of prompts. D. It keeps AI from ever operating inefficiently on this project. (incorrect) Responses for incorrect options: B. Partnering with AI to solve a complex problem will require more engagement from the subject matter expert. D. It does help with context, but you will still hit context window limitations after extensive prompting.	Likert scale format, and no less than 3 being open-ended questions. D. "Let's start developing the audience survey, but don't jump ahead to building it yet. We need to develop our research questions first." Below are the correct matchings to the items above. A. Assign AI an imaginary role to help it better refine the output. B. Give specific instructions that define the action, state the purpose, and set expectations. C. Be precise about your output requirements and provide examples. D Work with AI one step at a time.		
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ASSESSMENT				
Directions	Question:	Question:	Question:	Question :
Write each stem as a performance-based scenario question set in a realistic context. The question should connect with the action, LO, and content in the corresponding columns above. Ask yourself, “Can this assessment question be answered with the content written above in this template?” No matter what content you include when you develop the course later, if there is not enough content provided in this template to answer the question, you will need to expand the content above.	Step 1: Starting the Project Scenario: As a marketing consultant at SageFlow, you are working with a client, TerraTrack, who sells online project management software. TerraTrack has noticed that some event planners have started using their software. They would like Sageflow to help determine if TerraTrack should create a product specifically for event planners. Question 1a: What is the first step needed to use AI on this project?	Step 2: Effective Prompting Scenario: You are building a client satisfaction survey for Sageflow’s customer Heartfound.com, a donor management software company. AI is already aware of the product features and customer base. Question 2a: Which of the following prompts would best follow smart prompting technique # 2: Give specific instructions that describe the action, state the purpose, and set expectations?.	Step 3: Managing Context. Scenario: After an hour of prompting, the AI is bogging down, taking longer to answer, and giving you inadequate output. Question 3. In what order should you take the following steps to get AI working efficiently again? Match the text of the step with a step number.	
Directions	Correct Response:	Correct Response:	Correct Response:	
List the correct response to each question.	A. Create a context folder before prompting AI.	B. Create a client survey to collect	The order should be: 1. Ask AI to create a conversation summary	

		information about HeartFound's customers' satisfaction and pain points. Create 10 Likert scale questions and two open-ended questions.	2. Review the summary document 3. Place the document in the Project folder 4. Begin a new conversation, directing AI to access the project folder	
Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	
<i>List the distractors for each question. These distractors should be viable responses, based on the content you have included above, and not so unrelated that they are obviously wrong.</i>	B. Give AI a brief description of the project and ask it to produce a recommendation. C. Tell AI to search the web for how to do a market opportunity assessment.	A: Create a high-quality client survey for Heartfound's software customers. Make sure that it has a reasonable number of questions. C. Create a client survey for Heartfound's users. Make it easy to read, and not very time-consuming to fill out.	All of the responses are correct; they just need to be properly ordered.	●
Directions	Feedback for incorrect responses (What is the correct answer, and why?)	Feedback for incorrect responses (What is the correct answer, and why?)	Feedback for incorrect responses (What is the correct answer, and why?)	
<i>Provide clear feedback that explains what the correct answer is, and why it is correct.</i> <i>Note: You only need one set of feedback for all incorrect responses. For</i>	B. This option fails to create a rich context for AI to orient itself to the project. C. This could be helpful, but it does not	A: Terms like "reasonable" are vague. Specifics are needed.. C: This response does not name a specific purpose for the survey.	If any item is out of order: The correct order should be as follows: 1. Ask AI to create a conversation summary 2. Review the summary	

example, “That is incorrect, the correct answer is__because__.”	establish the particular context of the project.	We want to find customer satisfaction and pain points.	document 3. Place the summary document in the Project folder 4. Begin a new conversation, directing AI to access the project folder At this point, you’ll have a fresh conversation with more AI context to work with.	
Directions	Additional Question:	Additional Question:	Additional Question:	Additional Question :
Include additional performance-based scenario questions here. Note: You need to have a minimum of four questions, so a couple of your LOs may have more than one question. Please fill in the additional questions in the appropriate column under the corresponding LO. It is ok if some boxes are left blank in this section, as long as you have at least four total questions.	Step 1b: Create the initial project context folder. Scenario: You’re ready to create an initial project context folder to orient AI to the project. Question 1b: Which of the following items should be included in your project context folder? (choose all that apply)	Step 2b: Effective Prompting (Part II) Scenario: AI has suggested the text for a final proposal to the client. You believe the proposal text overpromises and sounds too heavy-handed and “salesy”. Question 2b: Which of the following strategies would help AI improve the current output? (choose all that apply).		
Directions	Correct Response:	Correct Response:	Correct Response	Correct Response:
If you have an additional	A. Sageflow’s quality	A. Ask AI to assume the		

<i>question for this LO, list the correct response to each question.</i>	standards document. C. The client's problem statement. D. Our SOP for this type of project (Audience Discovery) E. An example of all deliverables from a similar successful project.	role of the client and assess the effectiveness of the proposal. B. Ask AI to reference the "Sageflow Quality Standards" file in your project folder, and use the file to guide the rewrite of the proposal.		
Distractors (Incorrect Responses)	Distractors (Incorrect Responses)	Distractors (Incorrect Responses)		Distractors (Incorrect Responses)
<i>If you have an additional question for this LO, list the distractors for each question.</i>	B. Our company history F. A copy of the signed contract with the client.	C. Alert AI that the proposal is deficient and ask it to rewrite. D. Rewrite the proposal manually, and then ask AI to review it again.		
Feedback (Incorrect Responses)	Feedback for incorrect responses (What is the correct answer, and why?)	Feedback for incorrect responses (What is the correct answer, and why?)		Feedback for incorrect responses (What is the correct answer, and why?)
<i>If you have an additional question for this LO, provide clear feedback that explains what the correct answer is and why.</i>	If incorrect ones are selected: Company history is not relevant to this project, and would just take up additional AI context capacity. A signed contract doesn't provide useful data for solving this problem. If the correct ones are not selected:	If the incorrect one is selected: C. It would be more effective to provide guidance to AI as to why the output is deficient. D. This option misses out on the value of collaboration with AI. If the correct ones are not selected:		

	Our quality standards documents are needed to help AI prioritize quality over time savings. The client's problem statement specifically defines what we are setting out to solve. We need it. SOPs will help AI understand our problem-solving process. Completed examples are helpful because they help AI understand the scope and quality of the desired output.	A. Asking AI to put itself in the position of the client can be a valuable perspective shift for its next attempt. B. Asking AI to evaluate against the company's communication guidelines gives AI a set of criteria to apply to a rewrite.		
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