



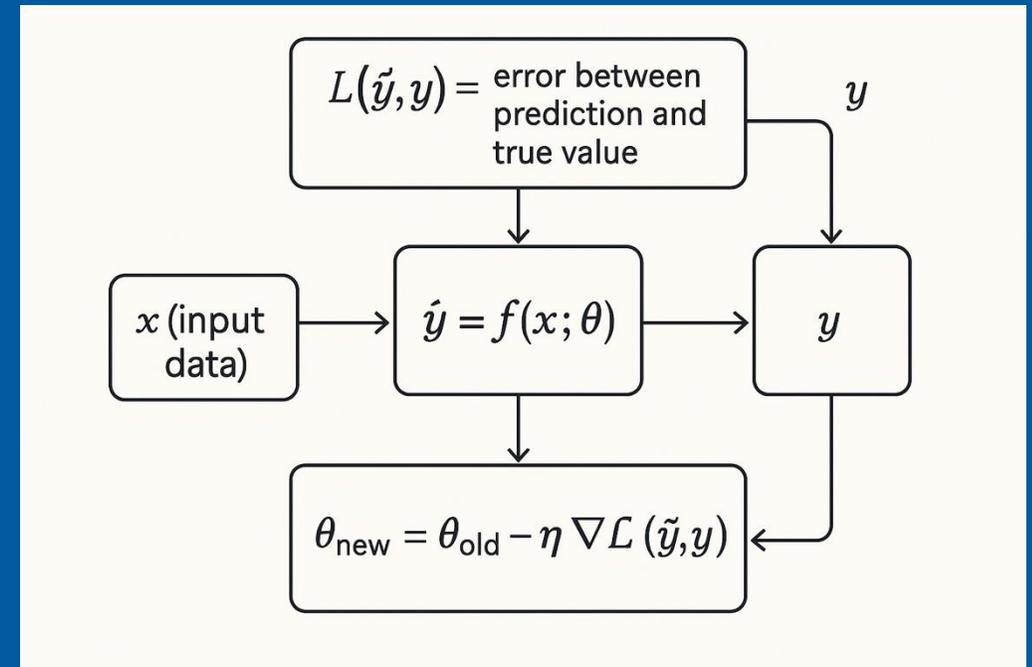
 DANIELS FUND.®

# Doing More with AI

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# Artificial Intelligence: What is Generative AI?

- Generative AI refers to models that create new content like text, images, codes, video, music, etc.
- AI is just math
  - Make a prediction ( $\hat{y}$ )
  - Measure the error ( $L$ )
  - Adjust the parameters ( $\theta$ ) using gradient descent



# Safe Practices to Remember

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- Think before your share
- Always remove personal identifiable information
- Replace specifics with placeholders
- Use secure, private, or enterprise versions of platforms
- Leverage temporary or incognito chats

# Bringing AI Into Your Daily Work



Contract Review

RFP Generation

Executive Summary

Data Analysis

FM Language Translator

# Prompt Engineering

# Building a Better Prompt

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1. Be a director not a bystander
2. Use constraints and context
3. Break down complex tasks
4. Incorporate examples
5. Embrace the back-and-forth

# Example of a Great Prompt

Act as a senior facilities manager advising executive leadership. Review the attached proposal and produce an executive-level analysis. Begin with a concise checklist of 3–7 bullets summarizing the most important takeaways in plain language, avoiding technical jargon. Then provide a structured summary addressing scope of services, total cost and notable cost components, contract term and key contractual provisions, key assumptions, flagged risks, exclusions, pricing concerns and operational or financial impacts explained clearly. Verify that each area is addressed and explicitly identify any information missing from the proposal. Conclude with a clear recommendation to proceed, renegotiate, or decline, with a brief rationale.

# You got a friend in ChatGPT

- Start with a good prompt
- Assess output and revise prompt
- Add context/constraints
- Repeat
- When in doubt, ask ChatGPT what the prompt is missing, then feed it into a new chat

# Contract Analysis

# Summarize, Flag and Redline

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I'm not using AI as a lawyer. I'm using it to translate elevator contract language into plain English and flag risks.

# Step 1 – English Please

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- Input contract
- Explain this contract language in plain English.
- Focus on term length, auto-renewal, and termination rights.

## Step 2 – Risks

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- Review this elevator contract language and identify:
  - Risks to the building owner
  - Vendor-friendly provisions
  - Items a facility manager should question

This doesn't mean it's wrong — it means it deserves attention

## Step 3 – Scope & Exclusions

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- **Clause:** This agreement includes routine maintenance and minor adjustments. Replacement of parts, components, and labor for major repairs, modernization, or code upgrades are excluded unless specifically authorized in writing and billed separately.
- **Prompt:** Summarize what is included vs excluded. Identify areas that commonly lead to disputes in elevator contracts.

## Step 4 –Leadership Prep

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- Prompt: Create a short summary for leadership highlighting
  - Key risks
  - Cost exposure areas
  - Contract terms that should be reviewed by legal
  - Limit to 5 bullet points.

# Summarize, Flag and Redline

- Prompt: You are a commercial building owner reviewing an elevator service contract from a vendor. Analyze the attached contract and do the following:
  - Summarize the contract in plain language, focusing on scope of services, pricing structure, contract term, and termination conditions.
  - Flag any clauses that are unfavorable, vague, one-sided, or risky for the building owner such as exclusions, escalators, response times, parts coverage, limitations of liability.
  - Identify missing items or unclear expectations that should be clarified before signing.
  - Write your response as if advising a knowledgeable but non-legal facilities professional.

# Tripple Check

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- AI ≠ legal advice
- Always review final contracts with legal/procurement
- Don't paste confidential pricing or proprietary clauses unless approved

# Request for Proposal

# RFP's

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- It's a formal document an organization uses to ask vendors to propose solutions for a specific project, service, or product.
- Prompting is the key, add service level agreement language
- Faster start
- Fewer missed sections
- More consistent RFP
- Think of ChatGPT as Your RFP Template Builder, A fast, organized first draft.

# The Human Touch

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ChatGPT writes the RFP and the FM makes it accurate

# Step 1 - Tell chat what you need

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- I'm a facility manager creating an RFP for landscaping services.
- Commercial office campus, 1.5 acres total.
- Includes turf, irrigation, trees, shrubs, and seasonal vegetation.
- Current issues: inconsistent mowing quality and poor irrigation repairs.
- Create a standard landscaping RFP draft.

# Standardize RFP

ChatGPT will typically generate:

- Property overview
- Scope of services
- Turf maintenance
- Irrigation maintenance
- Trees & shrubs
- Seasonal services
- Staffing & supervision
- Quality control
- Safety & insurance
- Reporting & communication
- Evaluation criteria

# Step 2 - Refine the Scope

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Rewrite the Scope of Services to emphasize:

- Consistent mowing patterns and edging
- Irrigation inspections and quick repairs
- Proactive identification of dying turf or plants

# Step 3 - Site-Specific Rules

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Add requirements that the vendor must:

- Coordinate with building occupants and security
- Follow site access and noise restrictions
- Protect hardscape, signage, and building entrances
- Repair damage caused by landscaping activities
- Report turf and shrub damages before leaving grounds

# Step 4 – Put it all together

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Review this landscaping RFP and identify:

- Areas that could cause confusion
- Gaps in scope that may lead to change orders
- Questions vendors are likely to ask

# Step 5 - Stress-Test

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Review this landscaping RFP and identify:

- Areas that could cause confusion
- Gaps in scope that may lead to change orders
- Questions vendors are likely to ask

# What's ahead?

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## IFMA HQ Support

- Custom GPT
- FM Chatbot
- Best Practices and ISO 41001:2018
- Colleagues, AI for Condition Assessment, Dean Stanberry

Thank You!

# Appendix

# Prompt Fundamentals

- Prompts are how we "program" AI
- Better prompts creates better results
- Prompting is a skill that improves with practice



# Why prompts fail

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## High Impact:

- Too vague
- Contradictory Instructions
- Missing context

## Medium Impact:

- Overcomplicating prompts
- No format guidance

# TRACER

**Task:** Clear Action and specific goal

**Role:** Define AI's persona (e.g., editor, analyst)

**Arrangement:** Bullets, table, paragraph, etc.

**Context:** Who, what, why

**Examples:** Formats you like, what looks good, etc.

**Rules:** Word count, tone



# Task

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**Task Formula:** Action verb + Quantity + Goal + Key detail

**Action Verbs:** Write/Generate/Create/Summarize/Draft

**Quantity:** Three emails, two descriptions

**Goal:** Setup a meeting, re-engage a cold lead

**Key detail:** How they would benefit, Audience Name

# Role

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Give ChatGPT a persona to emulate

Example Roles:

- CEO
- High school counselor
- Grantmaker
- Five-Star General

# Arrangement

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Format: bullet points, chart, a game that you can run in your browser

Length: A few paragraphs, three sentences

Tone: funny, witty, not pushy, confident

# Context

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## Where most mistakes are made

- Who are we talking to?
- What type of person are we looking for
- Where are they in the process
- Pain points or objections
- Program backgrounds

# Examples



Show, don't just tell, use  
successful past work



Instead of only giving instructions, feed in  
examples of the style, tone, or format you  
want.

# Rules

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Tell ChatGPT how long you want it (e.g., “3 sentences”, “under 100 words”).

Specify the voice: funny, inspiring, professional, bold, warm.

# Bad prompt, go to your room

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Here's how you used to write prompts before today:

- Summarize this landscaping proposal

# Getting Better

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Summarize this landscaping proposal highlighting scope, cost, and key recommendations.

# That sounded good, but...

- T -Task: Summarize (clear and actionable)
- R - Role: Missing, you don't specify who the AI should act as
- A – Arrangement: No instruction on format (bullets vs. paragraph)
- C - Context: Partially present, We know it's a landscaping proposal, but not who the summary is for or why it's being created
- E - Examples: Missing, No example of Desired length, Bullet vs. paragraph format, Level of financial detail
- R -Requirements: Missing, No guidance on Length, Tone or constraints