

A GUIDE FOR ANALYSTS, ADVISORS AND THEIR TEAMS

Using generative AI to help develop advice



INSIGHT TO ACTION
CONSULTING

WHEN GREAT ADVICE MATTERS

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A NOTE ABOUT GENERATIVE AI

This guide tends to refer to Copilot because many public sector teams will be using M365 Copilot as their main generative AI tool. This guidance also applies to other generative AI tools such as Claude, ChatGPT and Gemini. Capabilities of each vary by tool, licence and agency settings. Some versions can work directly within documents, while others are limited to chat.

Who this is for

This guide is for analysts and advisors who want to use generative AI while maintaining the expertise and judgement they bring to their work. It draws mainly on policy development in government, but the principles and practices apply across public sector advisory work and may also be useful in other settings.

Two principles can guide how you use generative AI

The advice in this guide can be summarised in two broad principles. They apply to most advisory work and can help you use generative AI while maintaining confidence in your capability and outputs.

Anyone who works in policy or advisory teams knows that developing advice is messy and rarely happens in a straight line. The scope may change as evidence emerges, possible responses may reveal gaps in the analysis and drafting may expose areas where the team has not yet formed a view. Generative AI can help at different points in that process. The important question is whether it is extending your thinking or taking responsibility for it.

Principle 1 - Think first, AI after

You own the thinking, and you will usually get the most value by forming an initial view and using Copilot to test it, expose assumptions and explore other possibilities.

Tips to consider:

- Be as clear as you can about what you are trying to solve or advise on before involving Copilot.
- Give Copilot a starting structure for the analysis, while allowing that structure to change as the work develops.
- Form a provisional judgement, then ask Copilot to test it and surface alternatives.
- Use Copilot to challenge and extend your thinking while retaining responsibility for the direction of the work.

Principle 2 - You own the output

Every piece of advice you submit is your advice. You should be able to stand behind it, explain it, and defend it. "Copilot told me..." is not a defence.

Tips to consider:

- Make sure you or someone involved in the work has the expertise to assess what Copilot produces. If nobody can judge the output, do not rely on it.
- Distrust and verify: Copilot is designed to be helpful. It makes mistakes and sounds confident when it does.
- Check Copilot's output against the source material, not just against other Copilot outputs.

YOU MAY BE RELYING ON COPILOT TOO HEAVILY IF:

- ☐ You cannot explain how a conclusion was reached.
- ☐ You have not reviewed the underlying evidence.
- ☐ You would struggle to defend the advice without reopening Copilot.
- ☐ You no longer know which ideas originated from you or Copilot.
- ☐ You accept outputs because they sound plausible rather than because they are supported by evidence.

A NOTE ON PROTECTING YOUR CAPABILITY

One important risk of using Copilot is that regular reliance on it can weaken the analytical skills that make advice valuable. Skills such as defining problems, structuring analysis and forming judgement need deliberate practice.

Use Copilot to build capability as well as complete tasks. Notice which parts of the work you are delegating and make sure you can still do the underlying thinking yourself.

Using Copilot through advisory work

The sections below describe common aspects of advisory work, rather than a sequence every project will follow. You might move between them several times as the work develops. Each section outlines where Copilot may contribute and what to watch for.

Copilot can complement peer review, engagement and discussion with colleagues. Those conversations remain essential because people contribute context, experience, challenge and accountability that Copilot does not have.

Defining the problem and scope

BEST CONTRIBUTION

Challenge and exploration. Use Copilot to test an emerging view, surface assumptions and explore other framings. You remain responsible for framing the problem the work should resolve.

✦ HOW COPILOT CAN HELP

- Check your problem statement for internal coherence and logical completeness.
- Surface alternative framings you have not considered – then you assess them yourself.
- Scan background material for relevant context and precedent.
- Identify what is already known and where the genuine evidence gaps are.

👁 WHAT TO WATCH FOR

- Begin with your own provisional framing, then ask Copilot to challenge it or offer alternatives.
- Treat any alternative framing as a hypothesis to examine, rather than an answer to adopt.
- Bring in colleagues and affected perspectives where the framing depends on context, experience or values that the tool cannot hold.

Making sense of evidence

BEST CONTRIBUTION

Synthesis and comparison. Copilot can process large volumes quickly and help reveal patterns. Check important summaries and interpretations against the source material.

✦ HOW COPILOT CAN HELP

- Synthesise large volumes of literature, research reports, and background material.
- Identify potential sources of evidence you may have missed (see "distrust and verify" below).
- Identify themes and patterns across multiple documents.
- Compare evidence across sources and surface areas of agreement and disagreement.
- Summarise stakeholder positions or consultation responses.

👁 WHAT TO WATCH FOR

- Distrust and verify: check findings against the source material before relying on them. For large volumes of material, you should test a sample of Copilot's outputs against the underlying evidence rather than assuming accuracy. This is where a good 'what we should see if it's working' sniff test brings value.
- Look for bias and omission in Copilot's output. Its summaries may flatten nuance or may downplay or mischaracterise the minority voice.
- Read the primary sources for the issues central to your advice. Generative AI can invent sources and citations, including references to primary legislation.

WATCH FOR AUTOMATION BIAS

Copilot often produces responses that are clear, confident and persuasive. Strong presentation should not be confused with strong analysis.

Be particularly cautious when Copilot provides a neat answer to a complex problem. Deliberately test alternative interpretations, ask for counterarguments and challenge initial outputs before accepting them.

Exploring possible responses

BEST CONTRIBUTION

Challenge and stress-testing. Use Copilot to broaden, test and refine possible responses. You decide the assessment criteria, weigh the trade-offs and form the recommendation.

✦ HOW COPILOT CAN HELP

- Test and challenge a longlist of options you can then assess and refine.
- Check that your options are mutually exclusive and collectively exhaustive against criteria you set.
- Stress-test the logic of your analysis – surface gaps, overlaps, weak assumptions or unintended consequences.
- Test options against explicit standards – for example, Treaty of Waitangi obligations, fiscal parameters, or ministerial priorities.

👁 WHAT TO WATCH FOR

- Set or confirm the assessment criteria yourself. Copilot can suggest possible criteria, but you need to decide which ones fit the context and why.
- Use gaps and challenges identified by Copilot as prompts for further thinking, evidence or discussion.
- Ask it to test your preferred approach and the alternatives rather than relying on it to rank them.
- Make sure you own, and can justify, the final assessment and recommendations.

COPILOT AS A CHALLENGER

One of Copilot's highest-value uses is acting as an intellectual adversary. Useful questions include:

1. What assumptions underpin this proposal?
2. What evidence would weaken this argument?
3. What unintended consequences might occur?
4. What would a critic or sceptical minister say?
5. What alternative interpretation/s fit the evidence?
6. Which stakeholder would disagree most strongly and why?
7. What questions is a Minister likely to ask?

Used this way, Copilot can strengthen judgement.

Developing the advice

BEST CONTRIBUTION

Drafting and refinement. Copilot can be a fast drafting partner, particularly when the question, intended outcome and emerging storyline are clear enough to guide it.

✦ HOW COPILOT CAN HELP

- Test an existing draft for clarity, flow and completeness.
- Generate a first draft from a structure or storyline you have already set – think of it as a fast first pass.
- Improve the clarity, flow, and pithiness of your own drafts.
- Check for logic gaps: does each section follow from the last? Does the recommendation follow from the analysis?
- Adapt tone for different audiences – a Minister's briefing, a Cabinet paper, or a consultation document each have different requirements.

👁 WHAT TO WATCH FOR

- Give Copilot a useful starting point: the clearer your question, intended outcome and emerging storyline, the more useful its drafting is likely to be. Drafting can also expose gaps that send you back to the analysis.
- Ask Copilot to surface weaknesses and offer alternatives, then decide what to change.
- Check the work closely. Copilot can labour a point, flatten an important distinction, conflate ideas or overstate an argument.
- Treat a first draft from bullet points as raw material. Fluent paragraphs can still say very little.
- When Copilot edits your writing, check that the substance, emphasis and necessary qualifications have survived.

Testing its quality

BEST CONTRIBUTION

Checking against standards. Copilot is useful for checking work against explicit written standards and surfacing gaps for you and your reviewers to consider.

✦ HOW COPILOT CAN HELP

- Check your draft against ministerial preferences, agency standards, or quality criteria you have documented.
- Test for internal coherence: does the analysis support the recommendation?
- Identify where the advice is unclear, where claims are under- or unsupported, or where key questions are unanswered.
- Check tone, register, and length against the requirements for the format (briefing, Cabinet paper, etc.).

👁 WHAT TO WATCH FOR

- Write the standard first: before asking Copilot to review your draft, write down what 'good' looks like. This might include what questions the Minister will ask, the requirements of a strong Cabinet paper and the tone for the reader. Then ask Copilot to check against these standards.
- Avoid asking only, "Is this good?" Give Copilot the standards and context you want it to use. Otherwise, it will judge the draft using general patterns from its training and may produce reassuring feedback that does not address what matters for this piece of advice.
- Ask Copilot to tell you its findings – you decide what to accept, what to reject, and what to rework.

Learning from what happens

BEST CONTRIBUTION

Synthesis and tracking. Copilot can help organise feedback, identify recurring issues and track what is changing. You interpret what those patterns mean for the advice.

✦ HOW COPILOT CAN HELP

- Synthesise themes from stakeholder feedback, consultation responses, and post-implementation monitoring.
- Identify common issues emerging from implementation.
- Support drafting of evaluation frameworks, review notes, and lessons-learned summaries.

👁 WHAT TO WATCH FOR

- You interpret what the evidence means for the policy, while Copilot identifies patterns.
- If implementation involves personal information (case data, correspondence naming individuals, client feedback with identifying details), you should check your privacy and algorithm impact obligations.

Quick reference: Copilot through advisory work

The table below summarises where Copilot may contribute during recurring moments in advisory work and where you should focus your efforts.

ADVISORY STAGE	WHERE COPILOT MAY CONTRIBUTE	WHERE YOUR FOCUS MATTERS
Defining the problem and scope	Challenge an emerging framing and surface alternatives	Decide what the advice is about and who it's trying to help
Making sense of evidence	Synthesise, compare and identify possible patterns	Check sources, preserve nuance and decide what the evidence means
Exploring possible responses	Broaden options, expose assumptions and stress-test consequences	Set criteria, weigh trade-offs and form the recommendation
Developing the advice	Draft, restructure and improve clarity from a useful starting point	Protect the logic, emphasis, qualifications and voice
Testing its quality	Check against written standards and surface gaps	Decide what to accept, reject or rework and retain peer review
Learning from what happens	Synthesise feedback, track issues and identify recurring themes	Interpret significance, account for context and decide what changes

REMEMBER THE TWO GROUND RULES

Think first, AI after – your thinking and judgement are the work; Copilot provides support.

You own the output – if you can't stand behind it, you shouldn't use it.