



iaee
webinars

Advanced Prompting

IAEE MASTER SERIES CERTIFICATE

Presented by Chris Gloede, CAE · Chief Consultant, Ricochet



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NEW ORLEANS



NEW ORLEANS & COMPANY



MEET THE PRESENTER

Chris Gloede, CAE

Chief Consultant · Ricochet

Association-industry consultant and technology evangelist. Chris helps associations put AI to work in the real world.



Welcome Back.

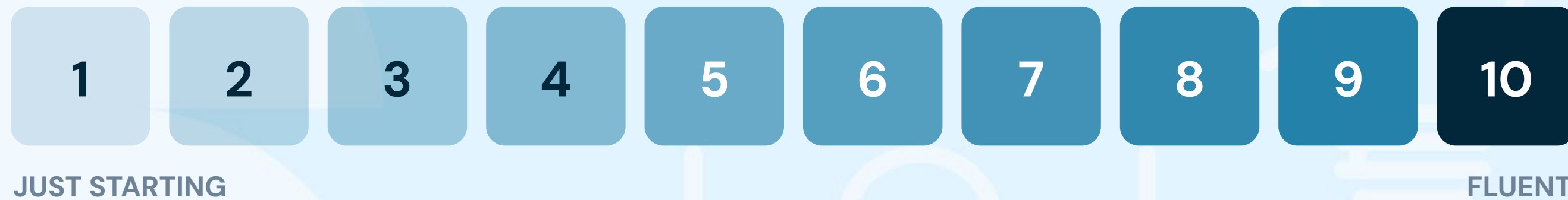
Picking up where session one left off.



SESSION ONE RECAP

Remember your score.

You gave yourself a 1 to 10 in session one. Hold that number. There is no retake today. You re-score at the end of session three.



What we covered in session one

 DONE Query (RTCF) Structure the ask: Role, Task, Context, Format.	 DONE Conversational Refine through back-and-forth follow-ups.	 AHEAD Zero · One · Few-Shot Show 0, 1, or a few example outputs.	 AHEAD Chain-of-Thought Ask it to reason step by step.	 AHEAD Meta Prompting Ask the AI to improve your prompt.
BEST FOR Any first ask: emails, briefs, summaries.	BEST FOR Getting a draft closer to what you pictured.	BEST FOR Matching a format or house style you already own.	BEST FOR Multi-step analysis you need to check as it goes.	BEST FOR When you are stuck on how to ask.

Remembering RTCF and Conversational

RTCF · THE FOUR INGREDIENTS

R

Role
Tell it who to be.

T

Task
What you want done.

C

Context
The facts it needs.

F

Format
How the answer should look.

CONVERSATIONAL · THE FOUR FOLLOW-UP MOVES

1

Narrow it
"Cut the preamble."

2

Change the angle
"Same message, for our board."

3

Push for depth
"What am I missing?"

4

Ask it to critique itself
"Where would a skeptic push back?"

Which technique, when

 ✓ SESSION 1 Query (RTCF) Structure the ask: Role, Task, Context, Format.	 ✓ SESSION 1 Conversational Refine through back-and-forth follow-ups.	 TODAY Zero · One · Few-Shot Show 0, 1, or a few example outputs.	 TODAY Chain-of-Thought Ask it to reason step by step.	 TODAY Meta Prompting Ask the AI to improve your prompt.
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Three things always running in the background

Privacy

YOUR RIGHTS

Do not feed AI what you could not put on a postcard. Know whether it trains on your data.

Tokens

YOUR EXPENSE

Every word in and out is metered. Long chats re-bill the whole history.

Energy

THE ENVIRONMENTAL COST

Each query sips power and water. Scale and retries add up.

BEFORE WE GO FURTHER

Get logged in

Open a tool and sign in before we start the hands-on part.



Use your favorite tool

Whatever you prefer or require.

OR



Use Claude

claude.ai — free to sign up.

Zero · One · Few Shot Prompting

Stop describing what you want. Show it.



THE WORD PEOPLE GET WRONG

What a “shot” actually is

IT IS

A shot is an **example** you hand the model.
A past email, a finished summary, a paragraph that already sounds like you.

IT IS NOT

An attempt. Zero shot does not mean you get one try, and few shot does not mean you keep retrying until it works.

Zero shot: no example

Nothing to copy, so it averages every trade show email it has ever read.

✓ Zero shot

ATTACHED

Nothing

One shot

Few shot

Write an email inviting medical device companies to exhibit at MedTech Expo.

One shot: one example

One example moves the voice. Structure still drifts.

Zero shot

ATTACHED

📎 MedTech-invite-spring.pdf

✓ One shot

Few shot

```
Write an email inviting medical device companies to exhibit at  
MedTech Expo. Match the voice of the attached email we sent  
last spring.
```

Few shot: three to five examples

Three gives it a pattern to copy. Past five, the gain flattens out.

Zero shot

ATTACHED

📎 MedTech-invite-spring.pdf

📎 Renewal-push-2025.pdf

One shot

✓ Few shot

Write an email inviting medical device companies to exhibit at MedTech Expo. Match the pattern in the attached emails.

Examples beat instructions

DESCRIBING IT

"Warm but not chatty. Confident.
Short. In our voice."

Every one of those words means something different to the model than it does to you. It guesses, and it guesses average.

SHOWING IT

"Here are two emails of ours that worked. Match their pattern."

Nothing to interpret. It copies the opening, the rhythm, the length, the sign-off, and where the ask sits.

You already
own examples

✉ Emails

🖼 Graphics

🔍 Google images

📺 Video recordings

💻 PowerPoints

📊 Excel files

THE PROMISE FROM SESSION ONE

Attachments take it to the stratosphere

An attachment is a shot you did not have to retype.

WHAT TO ATTACH

- Past campaigns and emails that performed
- Your style guide and brand voice doc
- The published show prospectus and floor plan
- Last year's exhibitor list

WHAT NEVER TO ATTACH

- Attendee or exhibitor personal data
- Contracts and anything under NDA
- Unpublished financials or board material
- Anything about a named member or staffer

MedTech Expo prospecting email, zero shot

ATTACHED

Nothing

Write an email inviting medical device companies to exhibit at MedTech Expo.

WHAT CAME BACK

"Dear Sir or Madam, We are pleased to invite your company to exhibit at MedTech Expo, a leading event for the medical device industry, attracting a wide range of qualified attendees..."

- ✗ Could be any show, in any industry
- ✗ No reason for this company to act
- ✗ Opens the way nobody on your team opens
- ✗ No deadline and no single ask

Same task, three of your emails attached

Same task. Match the pattern in the three attached emails.

📎 MedTech-invite-spring.pdf

📎 Renewal-push-2025.pdf

📎 First-time-exhibitor.pdf

ZERO SHOT

"Dear Sir or Madam, We are pleased to invite your company to exhibit at MedTech Expo..."

- ✗ Generic
- ✗ No hook
- ✗ No deadline

FEW SHOT

"Hi Dana, You worked booth 412 last spring and asked us about a corner unit for next year. One just opened on the main aisle..."

- ✓ Opens the way your team opens
- ✓ Names the show, the booth, the ask
- ✓ One deadline, one next step
- ✓ Length matches your own emails

Your turn: MedTech Expo exhibitor renewal outreach

Objective for the session: renew and grow the exhibitor base. Start with an RTCF prompt, then add your “shots”.

1

Pull three emails that worked

Sent folder. Real ones, not your best guess.

2

Explain the RTCF

“Act as our exhibition sales director. Write renewal outreach to a returning MedTech Expo exhibitor. Under 150 words, with a subject line.”

3

Ask for the pattern, not the words

“Match the pattern. Do not reuse the sentences.”

Chain-of-Thought Prompting

Work in steps, and check its work between them.



WHY THE ANSWER DISAPPOINTS

One prompt, too many jobs

Analyze our MedTech Expo exhibitor list, work out who is at risk of not renewing, explain why, and write outreach for each one.

WHAT COMES BACK

Four jobs answered without rich detail. The AI picks the easiest reading of every one and never tells you which assumptions it made.

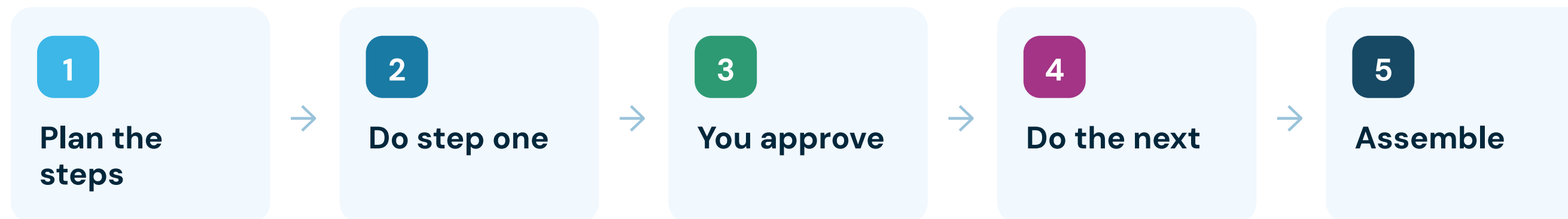
WHAT YOU CANNOT DO

Find where it went wrong. The risk list is built on a segmentation you never saw, so every word after it is suspect.

THE MOVE

What chain of thought does

You make it plan before it answers. The task gets broken into ordered steps, and you see the plan before any work is done on it.



WHAT IT IS

The task split into ordered steps, with the model stopping between them.

WHEN TO PULL IT

Analysis and judgement calls, where one wrong step early ruins everything after it.

WHAT IT COSTS

Slower. Twenty minutes of back and forth instead of one answer.

SAY EXACTLY THIS

The magic words

Break this into five steps. Complete step one only, then stop and ask for my approval before step two.

“BREAK THIS INTO FIVE STEPS”

Forces a plan you can read before any work happens. Wrong plan, wrong answer, and this is where you catch it.

“STOP AND ASK FOR MY APPROVAL”

The gate. Without it the model runs all five steps on its own assumptions and hands you a finished thing built on the first one.

Anatomy of a chain-of-thought prompt

ROLE Act as our exhibition operations analyst.
TASK Work out why some MedTech Expo exhibitors will not renew.
CONTEXT The show just closed with 40 exhibitors and sponsors, several first-time.
FORMAT Give me a short table for each step.

CHAIN OF THOUGHT ADDS

STEPS Break this into five steps and list them first.
STOP Complete step one only, then stop.
GATE Ask for my approval before you start step two.

MedTech Expo exhibitor retention, step one

ROLE

Act as our exhibition operations analyst.

TASK

Work out why some MedTech Expo exhibitors will not renew.

CONTEXT

The show just closed with 40 exhibitors and sponsors, several first-time.

FORMAT

Give me a short table for each step.

CHAIN OF THOUGHT ADDS

STEPS

Break this into five steps and list them first.

STOP

Complete step one only, then stop.

GATE

Ask for my approval before you start step two.

THE PLAN IT RETURNS

1

List the exhibitor segments across the 40 companies

2

Flag which segments carry renewal risk, and why

3

Test each reason against what we actually know

4

Rank the gaps by revenue at stake

5

Recommend where to intervene first

"Step 1: returning multi-year, returning single-year, first-time, and sponsors with no floor space. Approve to continue?"



Steps two through five, one gate at a time

- ✓ List the exhibitor segments across the 40 companies
APPROVAL GATE
- ✓ Flag which segments carry renewal risk, and why
APPROVAL GATE
- 3** **Test each reason against what we actually know**
APPROVAL GATE
- 4 Rank the gaps by revenue at stake
APPROVAL GATE
- 5 Recommend where to intervene first

Step three is where it earns its keep. That is where you catch the reason it invented.

What a real chain-of-thought run looks like

ONE ANALYSIS

2h 30m

start to finish, in one thread

Many refreshes and conversations at each step.



THE TRADE

When it is worth it, when it is not

WORTH IT

- Analysis where the first step decides everything after it
- Anything with money or a board decision attached
- Work you will have to defend to someone
- Problems you cannot fully define yet

NOT WORTH IT

- A single email or a summary
- Anything you could check yourself in a minute
- Work with one obvious right answer
- When you are in a hurry and the stakes are low

Your turn: MedTech Expo post-show exhibitor debrief

Same show, same 40 exhibitors. Write the RTCF prompt first, then add the three lines that turn it into a chain of thought.

Start with RTCF

- 1 "Act as our exhibition operations analyst. Debrief our MedTech Expo post-show follow-up. 40 exhibitors, several first-time. Short table for each step."

Add the step count

- 2 "Break this into five steps and list them first."

Add the stop condition

- 3 "Complete step one only, then stop."

Add the approval gate

- 4 "Ask for my approval before you start step two."

Meta Prompting

When the hard part is knowing what to ask.



WHERE WE ARE

Four down, one to go



✓ SESSION 1

Query (RTCF)
Structure the ask:
Role, Task,
Context, Format.

BEST FOR
Any first ask:
emails, briefs,
summaries.



✓ SESSION 1

Conversational
Refine through
back-and-forth
follow-ups.

BEST FOR
Getting a draft
closer to what
you pictured.



✓ DONE

**Zero · One ·
Few-Shot**
Show 0, 1, or a few
example outputs.

BEST FOR
Matching a
format or house
style you already
own.



✓ JUST NOW

Chain-of-Thought
Ask it to reason
step by step.

BEST FOR
Multi-step
analysis you
need to check as
it goes.



TODAY

Meta Prompting
Ask the AI to
improve your
prompt.

BEST FOR
When you are
stuck on how to
ask.

THE BLANK BOX

When you don't know where to start

| The AI model is better at writing prompts than you are.

WHAT ACTUALLY HAPPENS

You open the box, type something vague because you cannot yet name what you want, read a vague answer, and conclude the tool is not that useful.

WHAT IS REALLY WRONG

Nothing is wrong with the tool. You were handed a blank page and asked to write the question, which is the hardest part of the job.

THE MOVE

Ask the AI to write the prompt

You are a prompt engineer. I need to [what you are trying to get done] .
Ask me any questions you need, then write the prompt I should give you.

WHAT IT IS

The model writes your prompt, then you run it.

WHEN TO PULL IT

Any time you can name the outcome but not the ask.

WHAT IT COSTS

Two or three extra turns before real work starts.

Three moves — draft, critique, run

1 Draft

`"Write the prompt I should be giving you."`

It asks you questions first. Answer them properly, because those answers are the context.

2 Critique

`"What is weak about that prompt? Rewrite it."`

It knows what it is missing better than you do. One round of this is usually enough.

3 Run

`"Now run it."`

Paste it into a fresh chat so nothing from the drafting turns bleeds into the answer.

Build it: give it the goal

You know the outcome you want: find our MedTech Expo exhibitor retention gaps. You do not know the prompt. Ask for it.

You are a prompt engineer. I want to find the retention gaps in our MedTech Expo exhibitor base, the ones nobody on my team has thought to ask about. Ask me what you need to know, then write the prompt.

WHAT IT ASKS YOU FIRST

- 1 How many exhibitors, and how many are first-timers?
- 2 What do you already track at renewal time?
- 3 Who decides whether to rebook, and when?
- 4 What would count as a gap worth acting on?

These four questions are the work. Answering them is what you could not do from a blank box.

THE OUTPUT

The prompt it hands back

```
Role: Act as a membership and exhibitions analyst for a mid-size trade show. Context: MedTech Expo has just concluded with 40 exhibitors and sponsors, several of them first-time. The business goal is to renew and grow that base. Task: identify the retention gaps this team is unlikely to have considered. Look past the obvious ones (price, booth location, foot traffic). Consider onboarding, first-time exhibitor experience, sponsor-versus-exhibitor treatment, the gap between the sales promise and the show floor, and who owns the relationship between shows. Format: for each gap, give the signal we would see, the question we should be asking, and the cost of ignoring it. Rank by revenue at risk.
```

You would not have written that. It is longer, more specific, and it names five places to look that were not in your head.

THE THREE TOGETHER

Stack it

These are not three choices. On a real piece of work they run in order.

META PROMPTING

writes the prompt you could not write



CHAIN-OF-THOUGHT

runs it in gated steps you can check



FEW SHOT

shapes the output to look like your work

THE WHOLE SESSION, IN ONE LINE

Meta writes it.
Chain-of-thought runs it.
Few shot shapes it.

Underneath all three, still RTCF.

R T C F

Your turn: write the prompt you could not write

Pick something on your desk you have been avoiding because you cannot phrase it. Hand it the goal instead.

1

Name the outcome, not the ask

"I want to know why X keeps happening."

2

Let it interview you

"Ask me what you need, then write the prompt."

3

Make it critique its own draft

"What is weak about that prompt? Rewrite it."

4

Run it in a clean chat

Fresh window. Paste. Read what comes back.

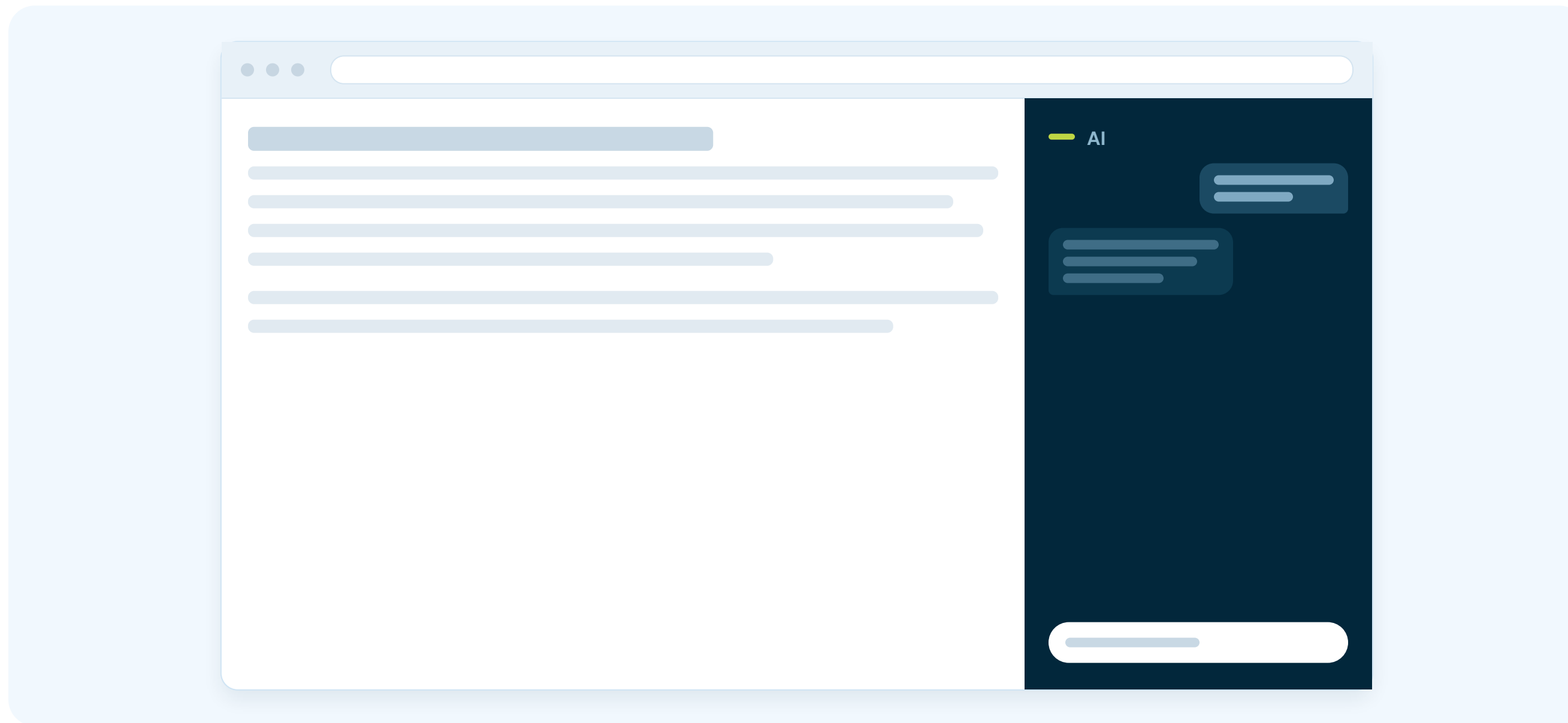
Prompting Tools

Small changes to where and how you prompt.



Sidebars

AI docked beside the page you are already on. They roughly all do the same thing.



Chrome side panel



Copilot sidebar



Claude for Chrome

Custom assistants

A saved set of instructions plus your own files, so you stop rebuilding the same prompt every week.

Gemini Gems

Google

Copilot Agents

Microsoft

Claude Projects

Anthropic

WHAT GOES IN ONE

Your role and voice, the rules you always repeat, and the example emails you have been pasting in by hand since the few shot block.

Talk, don't type — Wispr Flow

wisprflow.ai



“Draft a follow-up to today’s sponsors, thanking them and confirming next year’s booth.” **Typed for you, instantly.**



WHAT IT DOES

Hold a hotkey, speak naturally, and it types clean, formatted text wherever your cursor is: email, docs, Slack, or an AI chat window.



WHY IT'S WORTH TRYING

Talking is faster than typing. Use it to draft an email, or to talk through a full RTCF prompt before you ever open a chat window.



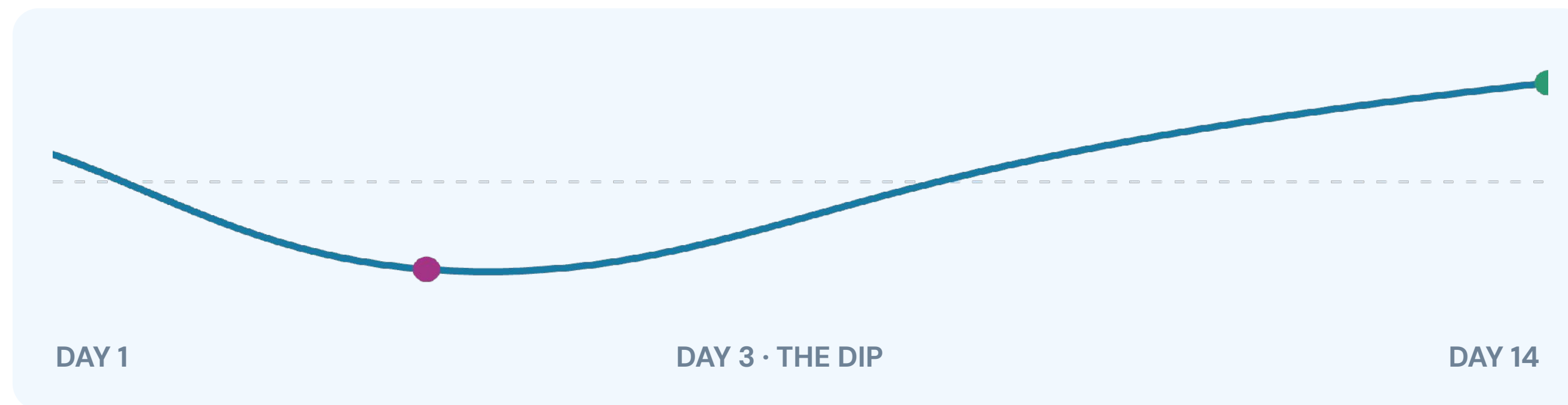
HOW MUCH IT COSTS

A free tier gets you started, then **\$15/month**, or **\$12/month** billed annually.

THE HONEST PART

The 14-day learning curve

Change feels worse before it feels better. Don't quit on day three and blame the tool.



IF YOU REMEMBER NOTHING ELSE

Three things to take away

1 Show it, do not just tell it.

Two or three of your own examples beat another paragraph of instructions. That is few shot.

2 Make the big job wait for you.

Break it into steps and approve each one before the next. That is chain of thought.

3 When you are stuck, ask for the prompt.

Hand over the goal and let it write the prompt, then critique it. That is meta prompting.

Open Discussion

Wrap Up

Thanks, next steps, and how to stay in touch.

Visual AI & Practical Application



SESSION 3

Presentation slides

Build and restyle a deck with AI.



SESSION 3

Image Creation

Make and edit images for your show.



SESSION 3

Video Development

Short clips from a prompt or a still.



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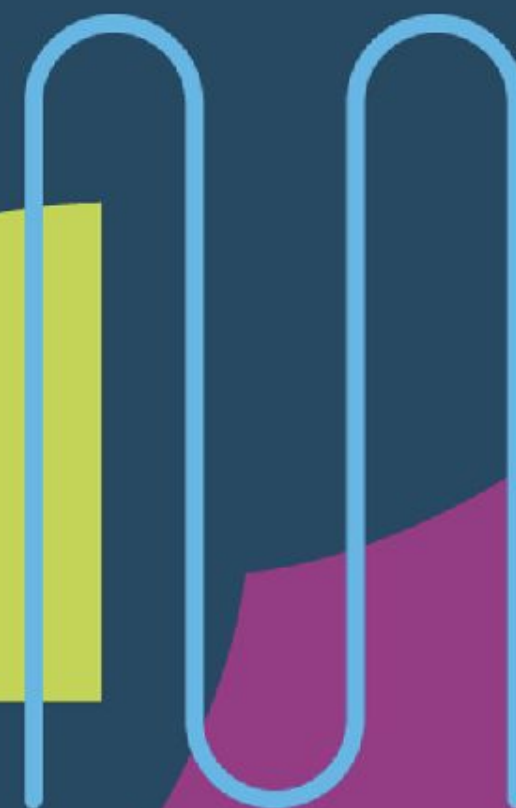
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