



iaee
webinars

The Basics of Prompting

IAEE MASTER SERIES CERTIFICATE

Presented by Chris Gloede, CAE · Chief Consultant, Ricochet



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NEW ORLEANS & COMPANY



MEET THE PRESENTER

Chris Gloede, CAE

Chief Consultant · Ricochet

Association-industry consultant and HubSpot Solutions Partner. Chris teaches the Association AI Accelerator and helps associations put AI to work in the real world.



Let's Go.

Three sessions, one skill: getting real work out of AI.

WHY THIS MATTERS NOW

Adoption is already here

~50%

Meeting professionals already using AI

Amex GBT, 2026

88%

Organizations now using AI

McKinsey

| The gap isn't access. It's knowing how to prompt.

NOT JUST FASTER — BETTER

AI improves the quality of the work itself

40%+

higher-quality output using AI vs. without

43%

improvement for the lowest-performing consultants — AI as a skill leveler

| 758 BCG consultants, 18 tasks — AI didn't just speed things up. It changed how good the work was.

Source: "Navigating the Jagged Technological Frontier," Harvard Business School & BCG, 2023.

THE PAYOFF

A couple of hours back, every week

2.2 hrs / wk

Saved by the average worker who uses AI

4+ hrs / wk

Saved by daily users

| A couple of hours back every week — if you use it well.

Source: Federal Reserve Bank of St. Louis

Orientation

How our sessions work together.

THE SERIES

Your AI Accelerator — 3 sessions

1

Basics of Prompting

TODAY

2

Advanced Prompting

AUG 13

3

Visual AI + Practical Application

AUG 20

Things to remember from today

1

RTCF

Role, Task, Context, Format — the shape of every strong prompt.

2

Prompt conversations, not searches

The first answer is a draft. Most of the value is in turns two through four.

3

Verify before you publish

Confident and wrong is the default failure. Fact-check in a second tool.

4

Keep private data out

Nothing confidential, unpublished, or about a real person in a personal tool.

5

Know the landscape

Four tools, different sweet spots — and it changes month to month.

Generative vs. Agentic AI

GENERATIVE

You ask, it creates **one output** — a draft, an image, an answer.

THIS IS WHAT TODAY IS ABOUT

AGENTIC

You give a **goal**; it plans and executes **multi-step work** across your tools.

THE NEXT LEAP — FAR MORE POWERFUL

| We're starting with generative. Agentic is where 2026 is heading.

How Good is Your AI?

A quick gut check, then the real number.



LIVE POLL

Score yourself

Rate your AI fluency, 1–10.

1	2	3	4	5	6	7	8	9	10
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JUST STARTING

FLUENT

YOUR NEXT STEP

Take the AI Benchmark

Get your real number — a quick, honest read on where your AI fluency stands.

ricochetadvice.com/iaee-ai-accelerator-resources/



AI overview

How it works, what kinds there are, and which tools matter.



How AI actually works

IT PREDICTS THE NEXT WORD

Over and over — one word at a time, based on everything before it.

Register

for

the



event

SO IT CAN BE CONFIDENTLY WRONG

That's why it can sound sure and still be wrong — a "hallucination."



Always verify before you publish.

LIVE POLL

Which assistant do you use most?

A ChatGPT

B Copilot

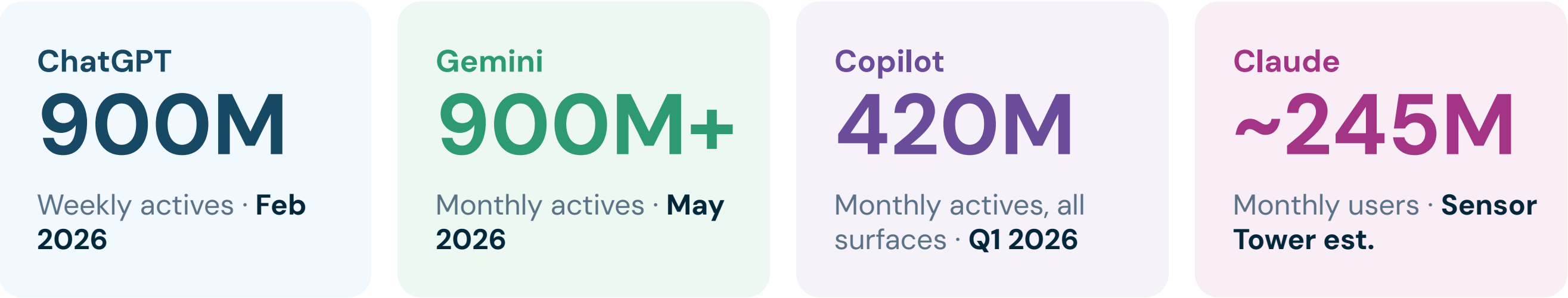
C Gemini

D Claude

E Haven't started yet

REACH, LATEST REPORTED

Who's reaching the most people?



Sources: OpenAI, Google I/O 2026, Microsoft, Sensor Tower estimate.

Three famous hallucinations

FEB 2024

Founding Fathers, reimagined

Asked for “the Founding Fathers in 1789,” Google Gemini generated racially diverse figures signing the Constitution. Google apologized and paused the feature.

2022–2024

Extra fingers, extra toes

Early image generators like Midjourney and DALL·E routinely gave people six fingers or extra toes — they predict pixels, not anatomy.

JUNE 2023

Six cases that never existed

Lawyers in *Mata v. Avianca* filed a brief citing six court cases ChatGPT had invented, complete with fake quotes. The court sanctioned them \$5,000.

DATA SAFETY

Keep it safe

SAMSUNG 2023

Engineers pasted chip source code and meeting notes into ChatGPT — three leaks in 20 days, then Samsung banned it.

JPMORGAN & WALL ST. 2023

Restricted ChatGPT over confidential client and trading data.

HEALTHCARE 2024

Hospitals found staff entering patient data into AI tools — a HIPAA exposure.

LAWYERS 2025

\$110,000 fine The largest AI-hallucination penalty in US legal history.

~11%

of what employees paste into ChatGPT is confidential.

ALWAYS ON

Three things always running in the background

Privacy

YOUR RIGHTS

Don't feed AI what you couldn't 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.

Prompting Techniques

How to phrase a prompt, the tools that help, and the RTCF framework.

ONE SKILL, FIVE MOVES

Prompting Techniques



Query (RTCF)

Structure the ask:
Role, Task,
Context, Format.



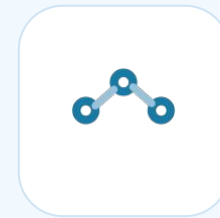
Conversational

Refine through
back-and-forth
follow-ups.



Zero · One · Few-Shot

Show 0, 1, or a few
example outputs.



Chain-of-Thought

Ask it to reason
step by step.



Meta Prompting

Ask the AI to
improve your
prompt.

WHEN TO USE WHICH

Which technique, when

 Query (RTCF) Structure the ask: Role, Task, Context, Format.	 Conversational Refine through back-and-forth follow-ups.	 Zero · One · Few-Shot Show 0, 1, or a few example outputs.	 Chain-of-Thought Ask it to reason step by step.	 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 exactly.	BEST FOR Math, logic, and multi-step decisions.	BEST FOR When you are stuck on how to ask.

WHERE WE ARE GOING

Our focus for today



TODAY

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



TODAY

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



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



Chain-of-Thought
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Meta Prompting
Ask the AI to
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HIGHLIGHTS

Zero-Shot, Chain-of-Thought, and Meta Prompting

We'll cover these in session two.



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



Conversational
Refine through
back-and-forth
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SESSION 2
Zero · One · Few-Shot
Show 0, 1, or a few
example outputs.



SESSION 2
Chain-of-Thought
Ask it to reason
step by step.



SESSION 2
Meta Prompting
Ask the AI to
improve your
prompt.

RTCF Prompting

The four-part framework behind every strong prompt: Role, Task, Context, Format.



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.

BEFORE YOU START TYPING

Three things running in the background

PRIVACY

What you paste

Nothing confidential, unpublished, or about a real person. No attendee or exhibitor data.

TOKENS

What it costs

Every turn re-sends the whole thread. Start a fresh chat when the topic changes.

ENERGY

What it draws

Each query uses power and water. One good prompt beats five sloppy retries.

A specific prompt is the privacy-safe, cheap, low-energy one. All three habits point the same way.

THE FOUR INGREDIENTS

RTCF



Role

Tell it who to be.



Task

What you want done.



Context

The facts it needs.



Format

How the answer should look.

Just the task

Role

✓ Task

Context

Format

Write a follow-up email to today's sponsors.

Vague voice — generic, could be anyone.

Add a role

✓ Role

✓ Task

Context

Format

Act as our exhibition sales director. Write a follow-up email to today's sponsors.

Speaks with authority and specifics.

Add context

✓ Role

✓ Task

✓ Context

Format

Act as our exhibition sales director. We hosted 40 sponsors at MedTech Expo this week, including three first-time exhibitors. Write a follow-up email to today's sponsors.

Now it knows the facts it's writing about.

Add format — the complete RTCF

✓ Role

✓ Task

✓ Context

✓ Format

```
Act as our exhibition sales director. We hosted 40 sponsors at MedTech Expo this week, including three first-time exhibitors. Write a follow-up email thanking them and confirming next year's booth. Keep it under 150 words, with a subject line.
```

Role, Task, Context, Format — all four, every time.

The difference it makes

WEAK OUTPUT

- ✗ Generic — could be any show
- ✗ No subject line
- ✗ No hook
- ✗ No clear ask

RTCF OUTPUT

- ✓ Subject line included
- ✓ Specific value — "8,000 qualified buyers"
- ✓ One clear call to action
- ✓ Right length and tone

How long should a prompt be?

✓ THE LENGTH

Specific and complete — never padded.
There's **no magic number**.

Models use a prompt's **start and end** best and lose the middle — put what matters most there.

! TOKEN HABITS

Never waste a whole prompt on "**thank you.**"

Every turn re-reads the entire conversation — by turn 50 you can be re-sending **40,000+ tokens**. Start fresh chats for new topics.

| Smart prompting saves money, tokens, and energy — all at once.

WORKSHOP

Your turn — live rewrite

STARTER PROMPT

Write something to get more exhibitors to sign up for our trade show.

ROLE

Who should the AI be?

TASK

Write what, exactly?

CONTEXT

Which show, which audience, what happened last year?

FORMAT

How long, what shape?

Conversational Prompting

RTCF gets you a strong first ask. Conversation gets you the right answer.

WHY ONE PROMPT IS RARELY ENOUGH

The first answer is a draft, not the answer

MOST PEOPLE

Ask once, skim the output, decide AI “isn’t that good,” and paste it into a doc anyway.

SKILLED USERS

Treat turn one as a starting point and spend three or four turns steering it to something they would actually send.

The AI remembers the whole thread — every follow-up builds on what came before.

Four follow-up moves

1 • Narrow it

"Just the three action items – cut the preamble."

Tighten scope, length, or focus.

2 • Change the angle

"Same message, but written for our board."

Same content, different audience or tone.

3 • Push for depth

"What am I missing? Add two points I didn't ask for."

Options beat one answer you have to fix.

4 • Ask it to critique itself

"Where would a skeptical reader push back?"

The most underused move – and often the most useful.

What it looks like in practice

Act as our exhibition sales director. We just closed MedTech Expo with 40 sponsors. Write a follow-up email. Keep it under 150 words with a subject line.

Returns a solid, slightly generic thank-you email.

Too long. Cut it to 120 words and lead with next year's booth deadline.

Tighter, better ordered — but the tone reads corporate.

Warmer, and add one line for our three first-time exhibitors.

A TRICK WORTH STEALING

Fact-check it in a different tool

The tool that wrote the draft is the worst judge of it. Have it write the fact-check prompt, then run that somewhere else.

1 • IN THE TOOL THAT WROTE IT

"Write a prompt I can paste into a different AI to fact-check every claim, figure and date in what you just gave me."



2 • IN A SECOND TOOL

Paste that prompt plus the draft. Ask it to flag anything it cannot verify and to cite a source for each figure.

Claude wrote it? Check it in Gemini.

This is how you stop a hallucination reaching your members.

Your turn — refine it live

You have an exhibitor–recruitment draft from your RTCF rewrite. Now have a conversation with it.

1

Narrow it

"Cut it to 120 words and lead with the booth deadline."

2

Change the angle

"Rewrite it for a company that has never exhibited with us."

3

Push for depth

"Give me three subject lines, most to least urgent."

4

Ask it to critique itself

"What is the weakest line in this draft?"

Prompting Tools

Where you reach AI day to day, and a tool worth adding to your kit.

Four ways to reach an AI tool



Web page

chatgpt.com · claude.ai · gemini.google.com — best for longer work.



START HERE

Browser sidebar

Chrome's side panel, Edge's Copilot sidebar — open next to whatever you're already doing.



Desktop app

Runs in the background — one keyboard shortcut away.



Built into your tools

Word, Outlook, Slack, Docs — no extra window at all.

WHERE TO GET IT

Sidebar and desktop app, by tool

	BROWSER SIDEBAR	DESKTOP APP
 Copilot	Built into Edge microsoft.com/edge	Windows copilot.microsoft.com
 Gemini	Built into Chrome google.com/chrome	Mac gemini.google/mac
 Claude	Claude in Chrome claude.ai/chrome	Windows & Mac claude.ai/download
 ChatGPT	ChatGPT Atlas chatgpt.com/atlas	Windows & Mac chatgpt.com/download

Talk instead of type

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.

Mac, Windows, iOS, and Android.

Open Discussion

Wrap Up

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

Advanced Prompting



Query (RTCF)

Structure the ask:
Role, Task,
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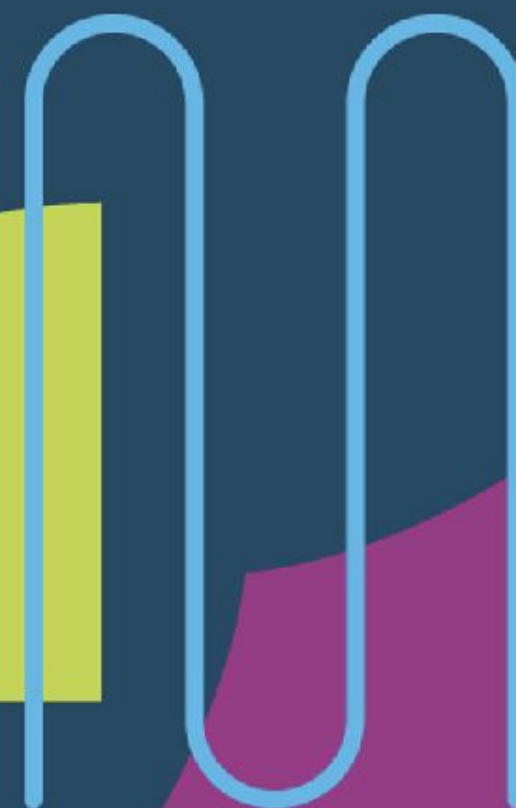
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