



THE GEN AI
ACADEMY

AI LEADERSHIP CHEAT SHEET SUMMARY

A reminder of the
frameworks and
learnings from the
LinkedIn Learning course



Thanks for taking the course. I hope you found it useful.

Congratulations on making the smart decision to take the course and download this guide.

In here, you'll find summaries of all the lessons, along with the frameworks I cover in the course. These are the frameworks and approaches I use with my own clients. I really hope you get value from them.

If you want help putting them into action, drop me a line. Our team of experts and myself would be delighted to help you on your AI journey.

A handwritten signature in black ink that reads "Dave". The signature is fluid and cursive, with a large, rounded initial "D" and a trailing flourish.

Dave Birss

LinkedIn Learning Instructor &
Co-Founder of The Gen AI Academy

WHAT WE MEAN BY AI

From Simple Rules to
Autonomous Agents

AI is everywhere in your daily life, working behind the scenes in everything from spam filters to Netflix recommendations. But not all AI is created equal - there's a whole spectrum of artificial intelligence, each with its own special talents.

Rules-Based Systems: The Digital Calculator

These systems operate on simple IF-THEN logic, making them reliable for straightforward, predictable tasks.

Machine Learning: The Pattern Detective

These systems, like experienced security guards, learn from numerous examples to identify patterns and anomalies, developing their own intuition.

Generative AI: The Creative Chef

AI with imagination generates new content, akin to a chef creating recipes from familiar ingredients. It can produce writing, images, music, and 3D models, with some systems being multi-modal, handling various media simultaneously.

Reasoning AI: The Scientific Thinker

Meet the methodical problem-solver, who follows logical reasoning. They currently excel in mathematics and science.

Autonomous AI Agents: The Project Manager

This is the latest AI offering. It combines multiple AI capabilities with the ability to take action. Give it a goal and let it plan, respond, and act.

Real-World Application: **Customer Service**

- **Rules-Based:** Routes "refund" mentions to returns department
- **Machine Learning:** Predicts customer churn based on behavior
- **Generative AI:** Creates personalized customer responses
- **Reasoning AI:** Analyzes complex complaints and suggests solutions
- **Autonomous Agents:** Manages entire customer interactions independently

Key Takeaway

Start simple. Don't use advanced AI when basic systems will do the job better and cheaper. Choose the right tool for your specific needs, not just the shiniest new technology.

THE AI ADOPTION JOURNEY

The Three Stages of
AI Transformation

Most organizations start their AI journey looking to slash costs. But that's like buying a Ferrari just to save time on grocery runs - you're missing the bigger picture. Here's how to think bigger about AI adoption.

Stage 1: REDUCE - The Efficiency Play

This is where most organizations begin - using AI to do things faster and cheaper:

- Internal: Meeting summaries, document proofing, routine tasks
- External: Customer service chatbots, automated data entry, basic process automation

Good start, but just scratching the surface.

Stage 2: AMPLIFY - The Force Multiplier

Here, AI supercharges your team's capabilities:

- Morgan Stanley's AI helps financial advisors spend less time on research and more on strategy
- GitHub's Copilot transforms good programmers into great ones by handling routine coding

Stage 3: DISCOVER - The Game Changer

This is where the magic happens - creating entirely new possibilities:

- Moderna revolutionizing mRNA vaccine development
- DeepMind's AlphaFold solving protein structures in hours instead of years

Leadership Challenge

Different departments will be at different stages - that's normal. But don't get stuck in Stage 1 thinking. Ask yourself:

- Are we using AI as a spanner for efficiency or a ladder for effectiveness?
- Are we helping people do less, or achieve more?
- Are we just doing the same things cheaper, or imagining new possibilities?

Key Takeaway

The AI adoption ship hasn't just sailed - it's got a rocket engine. While you're focused on incremental improvements, your competitors might be cooking up breakthrough innovations. Time to think bigger.

AI THAT FITS YOUR BUSINESS

Making AI Work for Your
Business Strategy

The most successful AI implementations don't start with AI - they start with business strategy. Amazon doesn't use AI because it's cool; they use it to be Earth's most customer-centric company. Here's how to ensure AI serves your strategy, not just your tech team's curiosity.

F - Foundation:

Understanding your core competitive advantage and what truly makes your business special. AI implementations should enhance these fundamental strengths, not replace them.

I - Impact:

Evaluating where AI creates genuine strategic value versus following trends. Separates transformative initiatives from expensive distractions that lack real business value.

T - Timing:

Assessing if the conditions are right to support successful AI implementation. Consider data availability, technology maturity, team capabilities, market readiness., and other factors.

S - Scale:

Ensuring AI solutions grow and improve with your business. Good AI investments become more valuable over time as they learn from more data and interactions.

Key Takeaway

AI isn't your destination - it's your vehicle. Make sure it's taking you where you want to go. Let AI be the accelerator of your strategy, not the driver. And remember: there's no speed limit on this journey.

AI IS ABOUT HUMANS

The Human Advantage
in an AI World

While AI systems excel at speed and accuracy, human abilities shine in unexpected ways. We may be slower and more prone to errors, but our capacity to spot novel patterns and make imaginative leaps reveals strengths that AI can't replicate.

Our "Weaknesses" Are Actually Superpowers

While AI excels at processing high volumes of tasks perfectly, humans possess unique abilities that machines can't replicate. We detect subtle emotional cues, understand unstated meanings, and build authentic connections that transform difficult situations into opportunities for loyalty.

The Uniquely Human Edge

Humans excel at reading between the lines, sensing emotional undercurrents, and making creative leaps beyond data patterns. Our ability to understand context, make value-based decisions, and imagine entirely new possibilities sets us apart from even the most advanced AI.

AI as the Amplifier

Rather than replacing human capabilities, AI enhances them by handling repetitive tasks and data processing. This frees humans to focus on interpretation, value creation, and strategic decision-making - areas where human judgment is irreplaceable.

The Path Forward

As AI handles increasingly complex tasks, human skills become more crucial. Success lies in developing deeper wisdom, building meaningful relationships, and fostering true understanding - qualities that go beyond mere information processing and knowledge accumulation.

Key Takeaway

Your emotions, intuition, and ability to wrestle with ambiguity aren't flaws - they're features. The future belongs to those who embrace what makes them uniquely human, and to the companies that understand the value in humanity.

HOW TO AVOID THE ADEQUACY TRAP

Excellence in an
AI-Powered World

While AI makes instant adequacy achievable, it risks bypassing the valuable learning journey that builds true expertise. When we skip the process of developing skills through practice and failure, we create teams that appear capable but lack deep understanding and originality. To counteract this, consider this framework:

S - Safety

Create an environment where experimentation is welcome and "I don't know yet" is an acceptable answer. Excellence requires boldness, and boldness needs safety.

T - Training

Build foundational skills. Teach thinking, not just prompting - it's so crucial that European companies are now required to train every employee who uses AI.

R - Resources

Provide tools, technology, and dedicated time for deep learning. You can't develop judgment in five-minute sprints between meetings.

I - Integration

Connect knowledge holders with knowledge seekers. Excellence spreads through conversation, not documentation.

D - Direction

Set clear standards for excellence and establish AI usage guidelines. Give your team a vision to aim for.

E - Excellence

Celebrate progress and brave failures, not just outcomes. Breaking new ground matters more than maintaining the status quo.

Key Takeaway

AI can make anyone adequate instantly. But excellence? That's still uniquely human - and it takes intentional effort. The difference between adequate and excellent isn't your AI tools - it's how you develop your people to use them.

THE TASKS AI IS GOOD AT

A Strategic Approach to
AI Implementation

Want to transform your organization's AI strategy? Start by understanding two types of work that impact employee engagement most: the tasks that make people groan (Drains) and the ones that make their eyes light up (Gains).

The Drains: Tasks to Minimize

These are the soul-crushing, time-consuming necessities:

- Data entry marathons
- Report formatting
- Endless meeting notes
- Routine email responses

The Gains: Tasks to Amplify

These are where people and organizations find real value:

- Innovation powered by AI insights
- Deeper customer relationships
- Strategy development with predictive analytics
- Complex problem-solving

Example Drains

Manual data entry, report formatting, meeting note-taking, routine emails, ticket routing, standard quality checks, basic customer inquiries, data processing, repetitive documentation

Example Gains

Innovation projects, customer relationship building, strategy development, complex problem-solving, process innovation, vendor relationship development, efficiency initiatives, service approach innovation, predictive analytics

Audit Your Teams

Systematically evaluate each department's workflows, surveying teams to understand their current processes. Create a clear map of time-draining tasks and potential opportunities for growth and innovation.

Assess AI Opportunities

Analyze which repetitive tasks can be automated and which high-value activities could be enhanced with AI, while clearly identifying areas that require preserving human judgment and interaction.

Take Action

Begin with easily automated tasks that offer significant impact with minimal risk. Carefully measure time saved and track how that time is reinvested, sharing successful implementations across teams.

Key Takeaway

AI's true value isn't in reducing headcount or cutting costs - it's in increasing impact and enabling your people to do more of what they do best. Start by asking two simple questions: "What work do you wish you could do less of?" and "What work do you wish you could do more of?"

BEING ACCOUNTABLE AND RESPONSIBLE

Who takes the rap if
things go wrong

Not everything that CAN be automated SHOULD be automated. Like delegating to a new team member, AI implementation requires careful consideration of responsibility and oversight.

The Three Levels of Automation

- Basic Automation: Simple, rule-based processes
- AI-Enhanced Automation: Traditional automation with AI components
- AI Agents: Systems with increasing autonomy and decision-making ability

The Automation Journey:

Low-Risk Tasks

- Routine, repetitive processes
- Clear success metrics
- Quick fixes if things go wrong
- Minimal human oversight needed

Medium-Impact Tasks

- Complex decisions requiring judgment
- Customer service responses
- Content creation
- Human monitoring and guidance required

High-Stakes Tasks

- Strategic decisions
- Major investments
- Brand-defining moments
- Humans lead, AI supports

The Automation Journey:

1. What's Really at Stake?

Consider all impacts, including financial consequences, reputation, customer trust, market position, and other factors.

2. What's the Right Oversight Model?

Choose between heavy upfront planning, end-stage review, and continuous monitoring.

3. Who's Accountable?

Ensure that there's clear ownership of processes, responsibility for outcomes, and human accountability for important decisions.

Key Takeaway

AI implementation is like teaching someone to drive - start in empty lots, progress to quiet streets, then tackle busy roads. More complexity means more supervision, not less.

The instinct is to hand AI leadership to the most technical person. But successful AI implementation isn't about neural network expertise - it's about bridging technology's potential with human adoption.

Core Leadership Requirements

Technical Literacy

- Understanding possibilities and limitations
- Evaluating vendor claims
- Translating technical jargon to business language
- Asking the right questions

Change Leadership

- Building compelling visions
- Creating momentum
- Managing resistance
- Driving cultural transformation
- Requires senior position for effective influence

People Development

- Identifying skill gaps
- Creating learning pathways
- Building tool confidence
- Developing new capabilities
- Maintaining momentum while managing concerns

Strategic Vision

- Linking technology to business goals
- Prioritizing opportunities
- Balancing quick wins with long-term value
- Spotting competitive advantages
- Making clear investment choices

Trust Building

- Creating psychological safety
- Ensuring responsible AI use
- Bringing people along the journey
- Enabling open dialogue about concerns

Implementation Tips

- Consider existing senior leaders who match these criteria
- If forming a committee, focus on action over politics
- Assign clear decision-making power to one person
- Move fast but bring people along

Key Takeaway

Your best AI leader isn't necessarily your most technical person - it's your best bridge-builder between technology and people. AI transformation is ultimately about enabling humans to achieve more.

THE PICKLE GUIDE TO AI PLATFORMS

From pre-made to
custom-built

Choosing the right AI approach is like picking your pickles. Here's how to choose between pre-packaged solutions, specialized tools, and custom development.

Three AI Approaches

1. Pre-Packaged AI (The Sandwich Pickle)

- AI features built into existing software
- Limited control but instant improvement
- Minimal setup required
- Perfect for common business needs

2. Specialized Tools (The Supermarket Shelf)

- Off-the-shelf AI solutions (ChatGPT, Midjourney, etc.)
- Various options to choose from
- Ready to use but more flexibility
- Good balance of capability and convenience

3. Custom Development (The Artisanal Kitchen)

- Built specifically for your needs
- Trained on your unique data
- Maximum control and customization
- Requires significant investment

Decision Factors

Data Considerations

- Is your data unique?
- Would custom analysis give you an edge?
- How sensitive is your information?
- What are your compliance requirements?

Business Requirements

- Do you need unique capabilities?
- How quickly do you need results?
- What's your budget for ongoing maintenance?
- Will standard tools differentiate you enough?

Practical Realities

- Custom development takes time
- Most organizations need a mix of solutions

Key Takeaway

Custom development, while powerful, is like making artisanal pickles - it's a significant commitment that's not always necessary. Choose based on your unique needs, data sensitivity, and resources.

CREATING AI GUIDELINES

Building guardrails, not
barriers

AI guidelines should work like a recipe - clear ingredients, simple steps, and ways to measure success. Let's create guidelines that people will actually read and use.

Safety First: The Don'ts

- Think "LinkedIn test" - if you wouldn't post it there, don't put it in AI
- Keep sensitive data in-house:
 - Company financials
 - Customer lists
 - Trade secrets
- Treat AI tools like you're working in a crowded coffee shop
- Remember: Uploading to public AI tools means losing data control

Success Second: The Dos

Writing Effective Prompts

- Think "new intern brief" not "vague directions"
- Provide clear context
- Be specific
- Include examples
- Leave nothing for misinterpretation

The Three Cs of Output Management

- Confirm: AI did what you asked
- Check: Facts are accurate
- Craft: Polish until it's signature-worthy

Tool Management

- List approved tools
- Clear policy on non-approved tools
- Balance restrictions with opportunities
- Allow for experimentation

Support Structure

- Clear contact for questions/concerns
- Process for sharing successful prompts
- System for reporting issues
- Method for sharing discoveries

Implementation Tips

- Make guidelines as clear as traffic lights
- Focus on enablement, not just protection
- Build guardrails, not barriers
- Create paths for sharing successes

Key Takeaway

Effective guidelines aren't just about using AI safely - they're about using it brilliantly. Think of them like traffic laws: they're not there to stop movement, but to help everyone reach their destination successfully.

ABOUT THE GEN AI ACADEMY

Helping businesses
maximise value from AI

We set up **The Gen AI Academy** to help businesses of all sizes, in every industry, in any part of the world get the most value from AI. Because we believe the successful approach to AI focuses on people, not tools.

We have a global team of experienced AI experts who specialise in different areas and industries. Which means you get the expertise you need from somebody who understands your issues.

We can help in a number of ways:

- **Online Learning:** Our on-demand video courses will help you upskill your workforce, wherever they are, in their own time.
- **Live Training:** We will tailor an education program for you and deliver it remotely or in person.
- **Consulting:** We will advise you on every stage of your AI adoption journey and work with you on your AI projects.
- **Mentoring:** We will guide your leaders on a one-to-one basis, upskilling them and giving them practical advice.

We help you put actual intelligence into your artificial intelligence.

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