

MAKE AI WORK FOR YOU

CFA Society Stamford

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THE MULTI-AI WORKFLOW

Different AI models have different strengths.

ChatGPT

Ideation & Drafting

Use for brainstorming and first drafts.

Claude

Analysis & Reasoning

Use for complex reasoning, long documents, nuanced critiques.

Gemini

Data & Integration

Use when needing Real-time data, integration into Google Workspace is a priority, or for multi-modal tasks.

Perplexity

Research & Sourcing

Use for search, citations, and references.

THE Four Pillars Prompt Engineering Framework

Pillar One

Role

Who Are You
Talking To?

Pillar Two

Context

What Does
the AI need
to know?

Pillar Three

Constraints

What Are the
Boundaries?

Pillar Four

Format

How should
the output
look?

The Framework in Practice

Role

I am a CFA charterholder and senior equity analyst with 15 years of experience covering mid-cap industrial equities.

Context

I've attached Q2 earnings call transcripts for three companies I cover. I need a comparative analysis to present at an upcoming meeting.

Constraints

Focus on forward guidance and margin commentary only. Do not speculate beyond what management stated. Flag any conflicting signals in the transcripts.

Format

Deliver a 3-column comparison table (company / forward guidance / conflicts) followed by a 3-sentence paragraph summarizing the results for each company.

The Prompt Upgrade

✗ Without the Four Pillars

"Summarize these earnings calls."

- Generic, no role assigned
- No context or purpose provided
- No constraints, results will vary widely
- Output format undefined

✓ With the Four Pillars

Role: Senior equity analyst

Context: Summarize Q2 earnings calls

Constraints: Guidance only, flag conflicts

Format: Table + 3-sentence synthesis

- Expert persona activates domain knowledge
- Purpose is explicit
- Repeatable for any earnings cycle
- Output is structured and ready to use

Chain of Thought: Make AI Show Its Work

- **Step One: Explain the Fundamental Problem Blockchain Solves**
- **Step Two: Describe how Traditional Solutions Fall Short**
- **Step Three: Walk Through How Blockchain Addresses These Shortcomings**
- **Step Four: Provide Concrete Examples**
- **Step Five: Discuss Current Limitations and Future Potential**

Self Critique and Iteration: Build Better Through Reflection

Critique your previous response on these dimensions

1. What important perspectives or stakeholders did I miss?
2. What assumptions am I making that might not hold?
3. Where is my reasoning weakest?
4. What additional information would strengthen this analysis?

Provide a revised response addressing these issues."

Context Preservation: The Four Layer Context Stack

- **Layer One: Clarify Your Primary Goal**
- **Layer Two: Track What's Been Discussed**
- **Layer Three: Document Preferences**
- **Layer Four: What Comes Next**

Four Prompt Patterns That Always Deliver

Specificity Beats Vagueness

Vague input leads to generic output.
Specific input focuses the LLMs response.

Front-Load Context

Models read prompts sequentially.

Don't One-Shot

Analyze the output, request targeted revisions.

Force Verification

Hallucinations reflect unwillingness to admit they don't know something.

Generate Perspectives Systematically

- **The optimist: What is the best reasonable outcome?**
- **The pessimist: What could go wrong?**
- **The financial analyst: What are the quantifiable costs and benefits?**
- **The implementer: What is actually required to execute this?**
- **The affected stakeholder: How does this look to people impacted by the decision?**

Three Prompt Patterns That Produce Confidently Wrong Answers

The Authority Gap

Avoid assigning the AI a role it can't play.

Specificity Creep

Do not ask for precise examples in general requests

Temporal Confusion

Ask about something that happened after the AI's training cutoff and it will answer anyway

Five Steps for Diagnosing Hallucinations

- **Step One: Verify Knowledge Boundaries**
- **Step Two: Check for Suspiciously Perfect Details**
- **Step Three: Use Verification Prompts**
- **Step Four: Apply the Reverse Prompt Technique**
- **Step Five: Cross Reference with External Validation**

Articulate Your Uncertainty

- What are you certain about
- What are you fairly confident about
- What are you guessing at
- What you do not know but matters

The Five Step Framework for AI Enhanced Presentations

- **Step One: Context Dump**
- **Step Two: Structural Exploration**
 - **Prompt for Three Structures**
- **Step Three: Content Development**
- **Step Four: Visual Strategy Development**
- **Step Five: Iterative Refinement**

Keep in Touch

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Get the Book

<https://www.amazon.com/Make-AI-Work-You-Workflows-ebook/dp/B0GNRDZ6TD>

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