

How to Train Your Staff to Use LLMs

How to Train Your Staff to Use LLMs

Table of Contents

- What are LLMs?
- Risks & Guardrails
- Use Cases by Role
- Prompt Writing 101
- Rollout Strategy
- Evaluation and Success Metrics
- Real-World Examples
- Troubleshooting & What-Ifs

What Are LLMs and Why Do They Matter?

LLMs are AI tools that generate human-like text. Employees may already be using them, knowingly or not, to write emails, summarize content, or generate ideas.

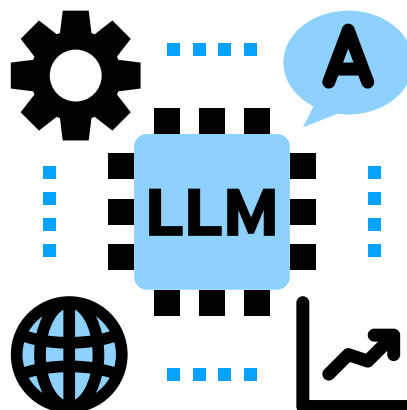
Think of an LLM like a really, really fast intern who never sleeps, sometimes guesses, and always sounds confident, even when it's making things up.

Popular Examples of LLMs Used in the Workplace:

- *ChatGPT (OpenAI)*: Great for drafting emails, summarizing notes, brainstorming content, and role-playing scenarios.
- *Claude (Anthropic)*: Known for longer memory windows and helpful in legal or research-heavy environments.
- *Gemini (Google)*: Often used within the Google Workspace ecosystem to enhance documents, spreadsheets, and search.
- *Copilot (Microsoft)*: Embedded in Microsoft 365 (*Word, Excel, Outlook*) to support real-time document generation and analysis.
- *Private or Fine-Tuned GPTs*: Custom internal tools trained on company-specific data, often used for SOP generation, internal FAQs, or compliance checks.

These tools are not just for tech experts.

When introduced responsibly, they can help operations teams save time, reduce manual effort, and enhance documentation accuracy.



Risks & Guardrails

LLMs are helpful, but careless use can lead to data leaks, legal issues, or inaccurate outputs. Top recommendation (*especially if this is all you read*): **Set boundaries early.**

Here is a great place to start:

(*more details on a rollout strategy on Page 6*)

- Share your company's AI Use Policy (*Here is a great example*).
- **Define what NOT to input:**
 - Personal customer data (*names, SSNs, credit card numbers, etc.*)
 - Proprietary company information
 - Legal pleadings, contracts, or sensitive internal docs
- **Reinforce:** Use only approved company accounts/tools, not personal ones.
- Conduct a risk scenario discussion where teams consider: "What could go wrong if this policy isn't followed?"

Some Quick Gotchas:

- **Don't upload client data, legal docs, or financials:** Sharing this type of information with third-party AI tools can violate data privacy laws (*like GDPR, HIPAA, or GLBA*), risk exposing sensitive customer information, and breach contractual confidentiality agreements. Unless, of course, you enjoy surprise appearances in tech headlines.
- **Treat LLM responses with a grain of salt:** LLMs can produce inaccurate or misleading information, and relying on them without human review may expose your organization to legal liability or compliance violations.
- **Don't share outputs directly with customers unless reviewed:** Unvetted AI-generated content may include biased or non-compliant language that could damage customer trust or result in regulatory scrutiny.

Use Cases by Role

Not everyone uses LLMs the same way. We suggest tailoring use cases to the department for relevance and adoption. Here are a few examples of how different departments can use LLMs.

By Role:

- Customer Support
 - Drafting and personalizing ticket responses
 - Summarizing long conversations for internal notes
 - Translating technical responses into simple language for customers
- Sales Support or Inside Sales
 - Rephrasing follow-up emails to match the customer's tone
 - Generating call summaries or outreach scripts
 - Creating objection-handling cheat sheets
- Workforce Management
 - Using LLMs to draft weekly shift summaries or status updates
 - Auto-generating training recaps from shift logs
 - Rewriting schedule change alerts for clarity and tone
- Quality Assurance / Compliance
 - Summarizing quality audit reports for executive briefings
 - Drafting pre-review documentation (*ex: SOP deviation notices*)
 - Preparing standardized responses to compliance questions
- Operations Leadership / Directors
 - Drafting internal strategy updates, all-hands memos, or project briefs
 - Summarizing performance dashboards into bullet-point insights
 - Generating talking points from team check-in notes

Prompt Writing 101

The quality of output depends on the quality of input (the “prompt”).

With crappy prompts, come crappy results. Don’t believe us? Just try it for yourself.



Good Prompt Examples

- “Summarize this complaint email in 3 bullet points with a friendly tone that acknowledges the customer's issue, shows empathy, and offers a clear next step. Ensure the summary is appropriate for use in a follow-up message or handoff.”
- “Rewrite this paragraph to sound more professional and concise by removing unnecessary filler words, improving sentence structure, and using formal language appropriate for business communication. Make sure the tone is respectful and the message remains clear and actionable.”
- “Give me 3 follow-up questions a support agent could ask after this customer message that show active listening, clarify any uncertainty, and guide the customer toward resolution. The questions should be empathetic, specific to the customer's concern, and help move the conversation forward constructively.”



Bad Prompt Examples

- “Fix this.” - Too vague. It will be as helpful as asking a coworker to “make it better” with zero context.
- “Make it better.” - Offers no guidance on what “better” means: tone, clarity, grammar, structure?
- “Summarize.” - Sure. But for whom? For what? LLMs aren’t mind readers... at least not yet.

Rollout Strategy

Providing a structured plan for rolling out LLM training in operations ensures the tools are used consistently, securely, and in ways that improve productivity across frontline teams, shift leads, and operations managers.

Try this plan:

(Adjust and change as you see fit)

1. Identify core operations functions (*ex: Agent supervisors, QA, fulfillment, reporting*) that will benefit most from LLM support.
2. Designate a rollout team including an operations manager, team lead, and an LLM-savvy frontline champion.
3. Start small. One team, one tool, one use case. This is a rollout, not a moon launch. No one needs a 97 slide PowerPoint just to draft a shift summary.
4. Track how often LLMs are used, what prompts are most helpful, and what staff misunderstand or resist.
5. Adapt training based on feedback. For example, add “prompt guides” that are specific.
6. Provide a toolkit for managers that includes talking points, approved prompts, and an LLM request log.
7. Roll out in waves by function, not by team. This allows SOPs and use cases to be better templated and reused.
8. Schedule short check-ins (*15–20 mins*) to discuss what’s working, flag concerns, and share wins.
9. Maintain a shared dashboard to monitor usage trends and highlight improvements (*ex: faster SOP updates and clearer handoff notes*).
10. Run quarterly AI safety refreshers. Always a good time to share recent lawsuits/etc. to show the consequences of using LLMs incorrectly. A good scare never hurt anyone :)

Evaluation and Success Metrics

Without tracking, it's impossible to know if LLM usage is safe, effective, or improving workflows.

Some things to pay attention to:

- Monitor employee adoption (*who is using approved LLM tools and how often*)
- Run quarterly knowledge checks to ensure policy understanding
- Track how many tasks have been enhanced or streamlined by LLMs
- Evaluate output quality and check for compliance with internal guidelines
- Collect stories and use cases to show ROI and learning wins

Here is an easy scorecard example you could use.

Keep it simple. No one likes extra work.

Metric	Target (examples)	Current	Notes
% of operations team trained on LLM policy	100%		
# of use cases submitted for review	5+ per quarter		
% of LLM-generated content reviewed by manager	100%		
# of reported misuse incidents	0		
Time saved per task (ex: SOP draft, report)	30–50%		
Satisfaction rating on LLM usage (internal survey)	8/10+		

Real-World Examples

Concrete examples help teams understand how LLMs can be practically used across roles.

Feel free to write your own prompts to see what examples are provided based on the specific use case you're planning to use LLMs for.

Sample Scenarios:

- **Operations Team:** Used LLMs to standardize internal documentation such as SOPs, reducing the time needed to onboard new team members.
- **Operations Managers:** Leveraged ChatGPT to create draft project plans and milestone summaries for recurring process improvements.
- **Workforce Planning:** Used LLMs to generate summaries from raw shift reports to help managers quickly assess performance gaps or staffing needs.

Side note: Encourage each team to log one successful use case per quarter to share company-wide.



Troubleshooting & What-Ifs

Clear answers to common concerns reduce uncertainty and build trust in the tools.

Scenarios to Address:

Q: What if I accidentally paste confidential data into an LLM?

A: Report it immediately to your manager and compliance officer. Do not reuse it.

Q: What if the LLM generates biased or offensive content?

A: Flag it and share the prompt/output with your team lead. This helps improve training and safeguards.

Q: What if I want to use AI for something new?

A: Submit the use case to your AI champion or team lead for review and approval.

Q: What if the LLM gives me a bizarre answer?

A: First, check your prompt. Garbage in = weird poetry out. If it still makes no sense, report it; not all AI hallucinations are creative masterpieces.

Next Steps

1. Take your ideas and brainstorm with your team. Make it a goal to come away with at least one thing you change or process you can implement.
2. Be a champion for the tools your team needs to succeed. Tech can change the game.
3. Check out our other resources that can help!
 - a. [AI Risk Assessment](#)
 - b. [The KPI podcast](#) featuring thought leaders across industries
 - c. And so much more [here](#)...