FIELD NOTE

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5 min read

Your AI assistant can build the deck. Give it the recipe first.

The model is not what fails on your monthly deck. The recipe is missing: your template, with its rules and checks. A skill carries it into your assistant.

IN SHORT

- Someone senior can lose a day every month to a deck. The content changes, but the work around it stays the same.
- The model is the engine, the harness is the assistant your team types into, and the skill is the recipe the harness reads.
- A prompt ends with the conversation. A recipe stays, so every person who opens the assistant starts from the same template, rules and checks.

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Read online: https://inocta.io/lab/field-notes/ai-presentations-on-your-template/

Every month, someone senior in your company can lose a day to a deck. It could be the board pack or the client report. What goes in it changes. The work around it does not: the same template, the same order, the same figures from the same spreadsheet, the same checks before anyone presents.

Ask an AI assistant to do it, and you get a fast answer that misses. The design is generic and the tone is not yours. Nobody can trace the figure on slide 4 either. Repairs then take the afternoon, and the time saved goes with it.

The model is rarely the problem. It writes and reasons well, and it can read a spreadsheet. What it does not have is your recipe.

01

Three pieces, not one

When people say "the AI", they mix three different things.

- **The model** is the engine. It supplies the reasoning and the writing.
- **The harness** is the working environment around the model: the assistant your team types into, such as Claude or ChatGPT. It decides what the model can open and run. It also decides where the model can save.
- **The skill** is the recipe. It is a folder that the harness reads when a task needs it. Inside are instructions and files, plus small programs. Skills follow an open format, so one recipe works in more than one assistant.

Most companies try to fix the result at the model level. They switch to a new model or write a longer prompt. A prompt ends with the conversation, and the next person starts from zero. A recipe stays, so every person who opens the assistant starts from the same template, the same rules and the same checks.

02

What goes into the recipe for an AI presentation

We built IO Deck to test this idea on the most ordinary task in a company: a PowerPoint. Its recipe holds what does not change from one month to the next.

- Your template. The deck is built in your own layouts, as an editable PowerPoint your team keeps working in.
- Your rules, such as which layout carries a key figure or how long a title can be. They also set how a section opens.
- Your checks. Before a chart or a table reaches a slide, the skill compares each of its figures with the spreadsheet it came from. A figure it cannot find in your file is refused, by name. A column with no unit gets a question, not a guess.

- A review. A build from a spreadsheet ends with a page that lists every checked figure and its result.

The short film below shows the idea in under two minutes.

Watch the video: https://inocta.io/lab/field-notes/ai-presentations-on-your-template/

03

What stays out of the recipe

The recipe does not write your story. That part stays with the person and the assistant, in the conversation.

You say which deck you need and attach your data. The assistant tells you which sheet it read. It also lists the columns and the rows. It asks what it cannot know, such as whether a column is in thousands or in millions. Then it proposes a storyline, and you change it.

What the deck says is up to the person. The recipe decides how the deck is built and what it is allowed to claim.

This split is the design choice that matters. A recipe that tries to decide everything breaks on the first unusual request. A recipe that decides nothing gives you the generic deck again. So the skill holds only the essentials. Your brand and your rules go in it, and so do your guardrails. The rest stays with the assistant and the person.

04

Where it stops

A recipe does not remove judgment, and the tool says so itself.

- The checks cover figures in charts and tables. A figure typed into a title or a sentence is not checked, so the review page asks you to read those before you present.
- They need an assistant that runs the skill's programs. In our tests, Claude, ChatGPT, Grok and Manus did. In the Microsoft 365 Copilot setup we tested, the assistant reads the instructions but runs no programs. There, a lighter version still builds on your template, and it does not present the figures as checked.
- Each month is a rebuild, not an edit. The skill builds a new deck from your template and the new numbers.
- Because the check tolerates rounding and units, it catches a figure that cannot be right, not every error. If you computed a figure yourself, such as a total or a growth rate, the skill marks it as yours. It does not check it.

These limits are part of the recipe. A tool that tells you what it did not check earns more trust than a tool that sounds sure of everything.

05

The deck is the small case

A PowerPoint is a simple problem, and that is why it makes a good test. The same pattern holds for any recurring document with rules behind it: a client report, a proposal, a month-end package, a quality record. In each case the knowledge already exists in your company. It lives in a template or a checklist, and in the head of the person who always does the job.

Three questions show where to start:

1. Which document does your team rebuild every month or every quarter?
2. Who knows the rules for it, and are those rules written anywhere?
3. Which figure in it would hurt most if it were wrong?

Our method has four steps: Map, Structure, Deploy, Manage. A skill belongs in Deploy. It comes after Structure, because nobody can write the recipe for work that nobody has described. Once the recipe exists, it goes into the assistant your team already uses, and every person starts from the same recipe.

06

Talk to us

If one document takes a day of a senior person's month, let's look at it together. Book a call with us. We map the work with your team and write the recipe. Then we put it in the assistant you already use.

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