




AI In the Office
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**AI in Action: How Financial Aid Offices
 Actually Use It**




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The Problem

Your office is not short on effort. It is short on time.

- Email volume is constant
- Policies keep changing
- Students expect instant answers
- Staff burnout is real

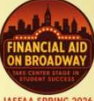


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The Shift

AI is not replacing staff. It is removing friction.

- Less rewriting
- Less searching
- Less starting from scratch
- More time for students and other work



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Ray Kurzweil - computer scientist, author, futurist, inventor

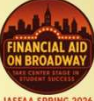
What we spend our time on is probably the most important decision we make.

What used to fit in a building now fits in your pocket, what fits in your pocket now will fit inside a blood cell in 25 years.

Our intuition about the future is linear. But the reality of information technology is exponential, and that makes a profound difference. If I take 30 steps linearly, I get to 30. If I take 30 steps exponentially, I get to a billion.

Artificial intelligence will reach human levels by around 2029. Follow that out further to, say, 2045, we will have multiplied the intelligence, the human biological machine intelligence of our civilization a billion-fold.


By around 2030, the most diligent and informed people will reach "longevity escape velocity"—a tipping point at which we can add more than a year to our remaining life expectancy for each calendar year that passes.



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Where AI Actually Fits

Communication	Operations
Training	Strategy



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AI + Communications



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Email Before vs After

<p>Before</p> <ul style="list-style-type: none"> • 10+ min. per email • Rewriting same answers, over and over • Inconsistent tone, sometimes depending on your mood at the time! 	<p>After</p> <ul style="list-style-type: none"> • Two minutes • Effective prompting + AI draft + human edit • Consistent messaging
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EMAIL RESPONSE PROMPTS

Write a clear, student-friendly email explaining why I was selected for verification and what documents I need to submit. Keep the tone supportive, avoid jargon, and include next steps.

Other Roles & Voice Prompt Examples

- Rewrite this text to be as simple and direct as possible. Aim for an 8th grade reading level. Avoid complex, jargon-heavy language.
- Convert this text from passive to active voice.
- Break this text down in the simplest way possible, as if teaching someone for the first time.
- Create an action-forward subject line.

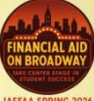


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Web + Email + Social + Front-Line Alignment

One AI-generated base message, adapted for:

- Website
- Email
- Social
- Front-line scripts



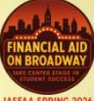
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ADDITIONAL PROMPTS

Website:
Rewrite the following financial aid policy into plain language for the website. Use short sentences, clear headers, and bullet points. Focus on what the student needs to do.


Social Media:
Turn this financial aid deadline into a short caption. Keep it under 100 words. Make it clear, direct, and action-oriented.

Front-Line Script:
Create a short phone script for a student employee explaining why a student's aid changed after the census date. Keep it simple and conversational.



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AI + Operations

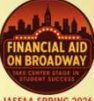


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AI as Your Second Brain

- Draft SOPs
- Rewrite policies
- Summarize federal updates
- Create checklists, PowerPoint slide outlines

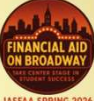
SOP/Process Prompt:
Turn this workflow into a step-by-step checklist for staff. Make it easy to follow and remove unnecessary language.



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Policy Translation

- **Input:** Federal Language
- **Output:** Student-ready explanation



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Policy Translation + AI = Web example

LONG-FORM ACCESSIBLE WEB CONTENT
Here is a financial aid policy. Keep it accurate and do not change meaning. Rewrite this as a student-facing website page.

Requirements:

- Use clear section headers
- Use short paragraphs and bullet points
- Define any financial aid terms in plain language
- Include a "What this means for you" section
- Include a "What you need to do" section with steps
- Include a short FAQ with 3–5 common questions
- Keep tone clear, supportive, and direct
- Write at an 8th grade reading level

Policy: [PASTE POLICY]



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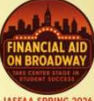
Policy Translation + AI = Email example

ACTION-FORWARD EMAIL
 Here is a financial aid policy. Keep it accurate and do not change meaning. Write a student email explaining this policy.

Requirements:

- Start with why the student is receiving this email
- Clearly state what changed or what matters
- Focus on what the student needs to do next
- Use short paragraphs and simple sentences
- Avoid jargon and explain any required terms
- Keep a clear call-to-action
- Keep tone supportive, not alarming
- Keep it under 200 words

Policy: [PASTE POLICY]



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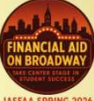
Policy Translation + AI = Staff Talking Point example

STAFF TALKING POINTS
 Here is a financial aid policy. Keep it accurate and do not change meaning. Create talking points for staff who are explaining this to students in person, on the phone, or by email.

Requirements:

- Use simple, conversational tone
- Focus on the most important points staff must communicate
- Include 3–5 key points
- Include a short "If a student asks..." section with example responses
- Highlight any areas where students may be confused or frustrated
- Keep responses clear, calm, and supportive

Policy: [PASTE POLICY]



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Policy Translation + AI = Alignment

Review the website content, email, and staff talking points.

Ensure all three:

- Use consistent terminology
- Emphasize the same key actions
- Do not contradict each other

Suggest any other edits needed to improve alignment and clarity.



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AI + Training + Staff Support




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Training Student Staff Faster

- Practice scenarios
- Generate call scripts
- Build confidence




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Reducing Burnout

- Less blank page stress (starting from scratch is hard!)
- Less repetitive writing
- Faster turnaround
- Efficiencies!



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AI + Strategy



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AI Helps You See Patterns


- What are students asking?
- Where are they confused?
- What emails are failing?



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Improve Before Problems Escalate

- Adjust messaging early
- Update auto-responses
- Fix web gaps



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AI + Guardrails



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What AI Should NOT Do


- No sensitive student data
- No final decisions
- No policy interpretation without human review



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What You Can Do Tomorrow


- Pick one process
- Use AI to draft once
- Refine (or provide a better prompt), and reuse
- Share with your team



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Take These for a Test Drive



- ChatGPT
- Monica
- Poe
- VideoGen
- Napkin AI



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Closing



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Questions?



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