SHORELINE ASIA

ADVISORY • LEARNING • TECHNOLOGY

FOUR DAY MASTERCLASS

Applied AI and Workforce Transformation

A practical Shoreline Asia masterclass for people who want to use AI effectively, redesign real workflows and build an evidence-based case for change.

Work on authentic business problems through guided exercises, small-team workshops, embedded coaching and practical experimentation. Develop the judgement to choose appropriate tools, test assumptions and recommend a responsible next step.

1 Learn

2 Apply

3 Build

4 Transform

5 Validate

AI CAPABILITY / WORKFLOW REDESIGN / RESPONSIBLE AI

THE MASTERCLASS

Masterclass overview

Build practical AI capability while developing a real business opportunity. The four days connect everyday AI use with workflow discovery, design, prototyping and business-case development.

Use AI with greater judgement

Practise research, analysis, drafting and problem solving with generative AI. Learn to frame useful instructions, challenge outputs and distinguish verified evidence from inference.

Identify worthwhile opportunities

Map an existing workflow, locate friction and decision bottlenecks, and compare opportunities by business impact, feasibility, data readiness, risk and time to value.

Design and test a practical response

Define a future workflow with clear human and AI responsibilities. Develop a prototype or structured demonstration that tests the important assumptions using the simplest suitable approach.

Make a reasoned recommendation

Bring value, delivery, people, data, economics and governance into an AI initiative business case. Explain whether to proceed, pilot, investigate further or stop.

Who the masterclass is for

Knowledge workers, managers, functional specialists and teams responsible for improving how work gets done. Applications can be tailored to operations, finance, product, sales, marketing, customer-facing work or cross-functional processes. Participants are not expected to become software engineers.

The programme is designed to strengthen individual capability, improve the quality of workflow proposals and build reusable organisational methods. Benefits depend on the use case, available evidence and subsequent workplace adoption.

THE SHORELINE METHODOLOGY

Five stages across four days

Learn → Apply → Build → Transform → Validate is one connected method. The stages overlap as teams move between learning, experimentation, workflow redesign and evidence-based decisions.



Learn Understand AI capabilities, limitations and responsible use.

Apply Use AI on practical research, analysis and workplace tasks.

Build Create only what is needed to test the important assumptions.

Transform Redesign workflows, human roles and controls around the business outcome.

Validate Challenge the evidence, value, feasibility and governance before recommending action.

DAY 1

Learn and Apply

Develop practical literacy, research skills, prompting discipline and AI judgement.

DAY 2

Discover and Prioritise

Map a real process, research alternatives and select an opportunity worth testing.

DAY 3

Design and Build

Define the future state, human and AI roles, controls and a bounded prototype.

DAY 4

Validate and Champion

Stress-test the proposition, complete the business case and present a recommendation.

Coaching throughout the Transformation Lab

Shoreline demonstrates the method, teams apply it, the facilitator and peers challenge assumptions, and teams iterate before an explicit decision gate. The business case develops progressively across Days 2 to 4. A weak idea can be simplified, redirected or stopped.

DAY 1 LEARN AND APPLY

Practical AI for knowledge workers

Develop the skills and judgement needed to work effectively with generative AI before applying them to complete business workflows.

AI strengths and limitations

Explore generative AI and large language models through demonstrations and exercises. Recognise hallucination, incomplete context, misplaced confidence and the continuing need for professional judgement.

Better prompting and conversation

Set objectives, context, constraints, examples and quality criteria. Ask AI to help formulate an instruction, then refine the result through critique and evidence.

Research and analytical thinking

Frame questions, analyse documents and structured information, seek contrary evidence and check sources. Recognise when a question needs formal statistical or predictive methods.

Specialist GPT design

Define purpose, users, instructions, approved knowledge and boundaries. Develop and test a simple specialist GPT concept or prototype where the approved environment permits.

GPTs agents and applications

Compare conversations, specialist GPTs, agentic workflows and applications. See where Streamlit and Codex can support a practical prototype.

Disciplined development

Turn an ambiguous task into a bounded instruction with scope, constraints, acceptance criteria, evidence and an explicit stopping condition.

Responsible AI and oversight

Work through realistic issues involving confidential data, bias, security, intellectual property, validation, autonomy and human accountability.

Application challenge

Apply the day to a candidate activity. Identify the minimum AI capability required, a material limitation and a governance consideration.

What participants develop

Practical prompting and research experience; a specialist GPT concept or prototype; a capability decision framework; a bounded development method; and candidate workflows for Day 2.

Day 1 question: Where could AI help this work, and what would make its use reliable and appropriate?

DAY 2 DISCOVER AND PRIORITISE

Finding opportunities worth pursuing

The Transformation Lab begins with a real process. Teams investigate what needs to improve before choosing an AI solution.

Define the business problem

Form a team around a relevant process and describe the issue without embedding a predetermined technology solution.

Map the current workflow

Capture activities, hand-offs, decisions, information, controls and customer interactions. Establish known performance issues and available baseline measures.

Diagnose friction and root causes

Examine repetitive work, queues, errors, rework, information gaps and decision bottlenecks. Distinguish symptoms from the underlying process problem.

Run a research sprint

Investigate how similar challenges are addressed in relevant sectors. Check evidence, examine failed approaches and separate credible findings from AI speculation.

Generate candidate interventions

Use workflow findings and research to frame a manageable set of options. Consider better prompting, analytics, process redesign, a GPT, an agent or an application.

Prioritise transparently

Compare business impact, feasibility, data availability, complexity, risk, readiness and time to value. Link the opportunity to relevant customer, growth, efficiency or profitability measures.

Challenge the leading ideas

Present the strongest candidates for facilitator and peer challenge. Revise the evidence, business significance, necessity for AI and proposed scope.

Select and begin the case

Record the initiative that merits further design, why alternatives were not progressed, and the first business-case sections covering the problem, baseline and intended contribution.

What teams develop

A current-state workflow; a defined problem; research evidence; a prioritised opportunity list; and, where justified, a selected initiative with initial measures and business-case sections.

Decision gate: Is the opportunity sufficiently important, feasible and evidenced to justify design effort?

DAY 3 DESIGN AND BUILD

Designing and testing the future workflow

Convert the selected opportunity into a clear future state and a testable prototype. The aim is evidence about the idea, with complexity kept proportionate to the problem.

Set the design objective

Restate the selected problem and intended business effect. Identify the assumptions that the design and prototype must test.

Design the future state

Map how the workflow should change, what can disappear, and what should become faster or more consistent. Compare it directly with the current state.

Allocate human and AI roles

Specify AI activity, human judgement, system responsibilities, approvals and exception handling. Make accountability and review requirements explicit.

Choose the simplest architecture

Justify whether the requirement needs a conversation, GPT, analytical model, agentic workflow, application or process simulation.

Build a bounded prototype

Develop only enough to test the proposition. Use approved tools and data, with each build step tied to an objective and acceptance test.

Test and iterate

Use expected cases, difficult cases and failure conditions. Record pass or fail evidence and change the prototype where testing reveals a material weakness.

Assess governance and dependencies

Review data, privacy, security, oversight and operating requirements. Identify technology, integration, people, ownership and change dependencies.

Update the business case

Capture the future workflow, solution design, prototype findings, roles, risks, requirements and unresolved assumptions for Day 4 validation.

What teams develop

A future-state workflow; human and AI roles; a justified technology approach; a prototype or equivalent proof of concept; test evidence; a proportionate risk review; and a substantially developed business case.

Decision gate: What has the prototype demonstrated, what has failed, and what remains to be validated?

DAY 4 VALIDATE AND CHAMPION

Building the case for a decision

Challenge whether the initiative is desirable, feasible, viable and governable. Convert the work into a business case with a recommendation proportionate to the available evidence.

Review evidence and assumptions

Separate what has been demonstrated from what is estimated or unknown. Agree the remaining management questions and validation gaps.

Validate business and customer value

Test the importance of the problem, who benefits and what changes. Compare non-AI alternatives and the consequences of doing nothing.

Assess benefits and economics

Define measures, baselines and measurement sources where available. Distinguish hard benefits, capacity release and quality improvements. Develop indicative costs, return or payback only where the evidence supports them.

Define delivery and pilot requirements

Identify pilot scope, people, change, data, systems, ownership, approvals and risk mitigations. Set decision points and stopping conditions.

Complete the AI business case

Bring together the case for change, strategic contribution, current and future state, solution design, value, delivery, responsible AI and recommendation.

Prepare the executive storyline

Explain the problem, proposed change, evidence, value, risks, delivery path and decision sought in a concise management presentation.

Present and respond to challenge

Test the proposition with Shoreline and peers. Record material objections and evidence gaps, then refine the recommendation.

Agree the next action

Choose proceed, pilot, investigate further or stop. Identify an owner, the evidence and approval needed, a next milestone and a success measure. Complete a Personal AI Application Plan.

What teams develop

An evidence and assumption register; benefit measures and indicative economics; a pilot pathway; an AI initiative business case; an executive presentation; and an owned next-step plan.

Implementation and investment decisions remain subject to the organisation's normal technology, finance, data, security and governance approvals.

PRACTICAL TOOLS AND PROJECT DISCIPLINE

Choosing and controlling AI tools

Choose technology after defining the business need. Participants learn what each level adds, what it costs in complexity and when a simpler approach is sufficient.

Prompt and conversation

Use ChatGPT or an approved equivalent for research, synthesis, drafting, analysis, critique and structured problem solving. Clear objectives and source checking remain essential.

Specialist GPT

Create a focused resource for recurring work using persistent instructions, approved knowledge and explicit boundaries. Define tests, ownership and maintenance.

Agentic workflow

Explore AI that can sequence or take actions. Introduce autonomy only where the requirement justifies the additional testing, control and oversight.

Application and analytical tools

See how Streamlit can provide a usable interface and Codex can support supervised development. A prompt workflow, analytical model or process simulation may be enough to test the idea.

The bounded step method

One objective → one bounded action → evidence or test → pass or fail → stop or continue.

Before building, define scope, constraints, acceptance criteria, evidence required, decision gates and a stopping condition. The next step follows from evidence. Challenge AI suggestions that silently expand the requirement or add unnecessary architecture.

Recognise scope creep, repeated polishing, over-engineering, excessive controls, project redefinition and context drift. Keep versions, tests and decisions traceable. The preferred solution is the simplest approach that can reliably meet the business need.

RESPONSIBLE AI BY DESIGN

Working responsibly with AI

Governance starts when the problem is defined and continues through research, design, testing and the final recommendation. Exercises operate within the organisation's approved tools, data rules and oversight arrangements.

Reliability and evidence

Check sources and material claims, test outputs and distinguish model-generated inference from verified facts. Recognise hallucination and incomplete context.

Confidentiality and data

Protect personal, customer and commercially sensitive information. Use approved environments and observe data-sharing restrictions.

Bias and fairness

Examine bias in source data, model behaviour and human use. Apply particular care where outputs could affect customers or material decisions.

Security and third parties

Consider access, credentials, external tools, vendor dependencies, third-party processing and changes to external services.

Human accountability

Define who remains responsible, which decisions require review, when escalation is needed and where judgement cannot be delegated.

Auditability and control

Retain instructions, versions, representative tests, evidence, exceptions and decisions so material outputs can be explained.

Intellectual property

Check the use of source materials, generated content, proprietary knowledge and externally derived material.

Ownership and proliferation

Avoid duplicate GPTs, agents and tools without a defined owner, approved data, maintenance responsibilities or retirement criteria.

Match controls to the potential harm

Consider materiality, data sensitivity, autonomy and reversibility. A summarisation aid and an automated customer decision require different levels of control. Proportionate governance supports responsible experimentation within clear boundaries.

REUSABLE PARTICIPANT RESOURCES

The AI Transformation Toolkit

The toolkit follows the same sequence as the workshop, helping participants reuse the method in everyday work and future initiatives.

Use AI effectively

The AI Transformation Workbook connects activities across all four days. The Prompt and Conversation Guide, Research Prompt Library and Source Validation Guide support structured research, critique and evidence checking.

Discover and decide

The Opportunity Discovery Guide and current-state and future-state workflow canvases make process problems visible. The Opportunity Prioritisation Matrix and Benefits and KPI Framework help compare impact, readiness, risk and value.

Design build and test

The GPT Design Canvas, GPT Testing Checklist and AI Capability Decision Guide support tool selection. The Bounded-Step Development Canvas, Prototype Brief and Acceptance-Test Template record scope, assumptions, scenarios and results.

Govern and deliver

The Responsible AI Checklist, Human and AI Role Canvas, risk prompts and implementation dependency tools support proportionate controls, accountability and delivery planning.

Make the case

The AI Initiative Business Case methodology and template bring together value, delivery, data, people, economics, governance and recommendation. The executive presentation structure helps communicate the decision sought.

Apply and continue

The Personal AI Application Plan and team action plan turn learning into specific workplace practices and next steps. Champion and facilitator guidance can support continued internal use where included.

Digital resources where arranged

A lightweight Shoreline AI Transformation Hub can provide access to approved prompts, templates, checklists, examples and cohort resources. Hub functionality, access and availability are agreed before delivery. Cohort artefacts can be retained for internal testing where organisational policy permits.

DELIVERY AND PREPARATION

How the masterclass is delivered

The core format is a four-day facilitated, face-to-face masterclass. Demonstrations, individual exercises, small-group workshops, hands-on development and embedded coaching connect learning with application.

Function specific or cross functional

A common methodology supports different business contexts. Examples, research prompts, workflows and prototypes can be adapted to a function or to a journey that crosses departmental boundaries. Small Transformation Teams preserve practical participation and peer challenge.

Preparation for practical work

Before delivery, confirm learning objectives, relevant workflows, approved AI environments and governance boundaries. Participants identify one or two genuine problems or opportunities and bring available baseline information without including restricted data.

Optional LMS foundations

Where an LMS pre-course is arranged, four short sessions establish a common starting point. A short knowledge check and workflow pre-work prepare participants for the practical workshop.

1 Understanding generative AI

Capabilities, limitations and a shared vocabulary.

2 Getting the best from ChatGPT

Objectives, context, constraints, iteration and critique.

3 Research and responsible AI

Source validation, information handling and oversight.

4 From idea to business opportunity

The capability ladder and candidate workflows.

Capability transfer options

Selected internal champions can receive facilitator guidance and a short champion session to help colleagues reuse the method. Optional pre-course, hub and champion arrangements are confirmed as part of programme design.

FROM WORKSHOP TO WORKPLACE

Applying the learning at work

Participants leave with reusable methods and a practical next step. Teams identify the evidence, ownership and approvals needed to move an idea beyond the workshop.

Apply in everyday work

Use approved prompting, research, document-analysis and validation methods. The Personal AI Application Plan identifies specific practices to adopt and a workflow to revisit.

Pilot where justified and approved

Define a limited scope, success measures, responsibilities and stopping conditions. Use operating evidence to assess value, feasibility and risk.

Continue controlled testing

The team owner coordinates the next bounded action, closes evidence gaps and seeks relevant data, technology, risk and governance input.

Review and decide

Decide whether to stop, refine or scale. An opportunity register and internal champions can help retain learning and reduce duplication across teams.

Why Shoreline Asia

Shoreline Asia brings insurance and financial-services experience, product and business expertise, consulting and capability development, alongside hands-on work with generative AI, specialist GPTs, analytical tools and practical applications. The masterclass connects business judgement with supervised experimentation and disciplined evaluation.

Planning a masterclass

Start with the participants, the work they need to improve and the approved learning environment. Confirm the delivery arrangements, practical focus and optional resources with Shoreline Asia.

Discuss an Applied AI masterclass admin@shoreline-asia.com