

AI BEYOND CHARTING:
THE PRACTICE MANAGER'S NEXT-
MONDAY WORKFLOW PLAYBOOK

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"YOU'RE NOT SHORT ON EFFORT.
YOU'RE SHORT ON TIME."

WHAT AI IS (AND ISN'T)

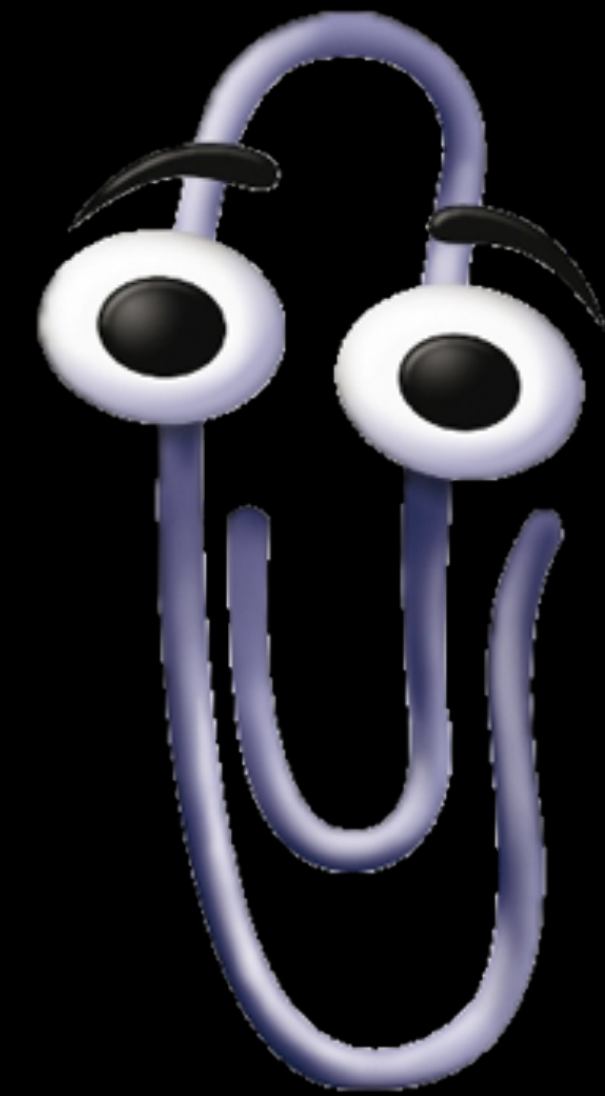
"Not thinking"

"Not judgment"

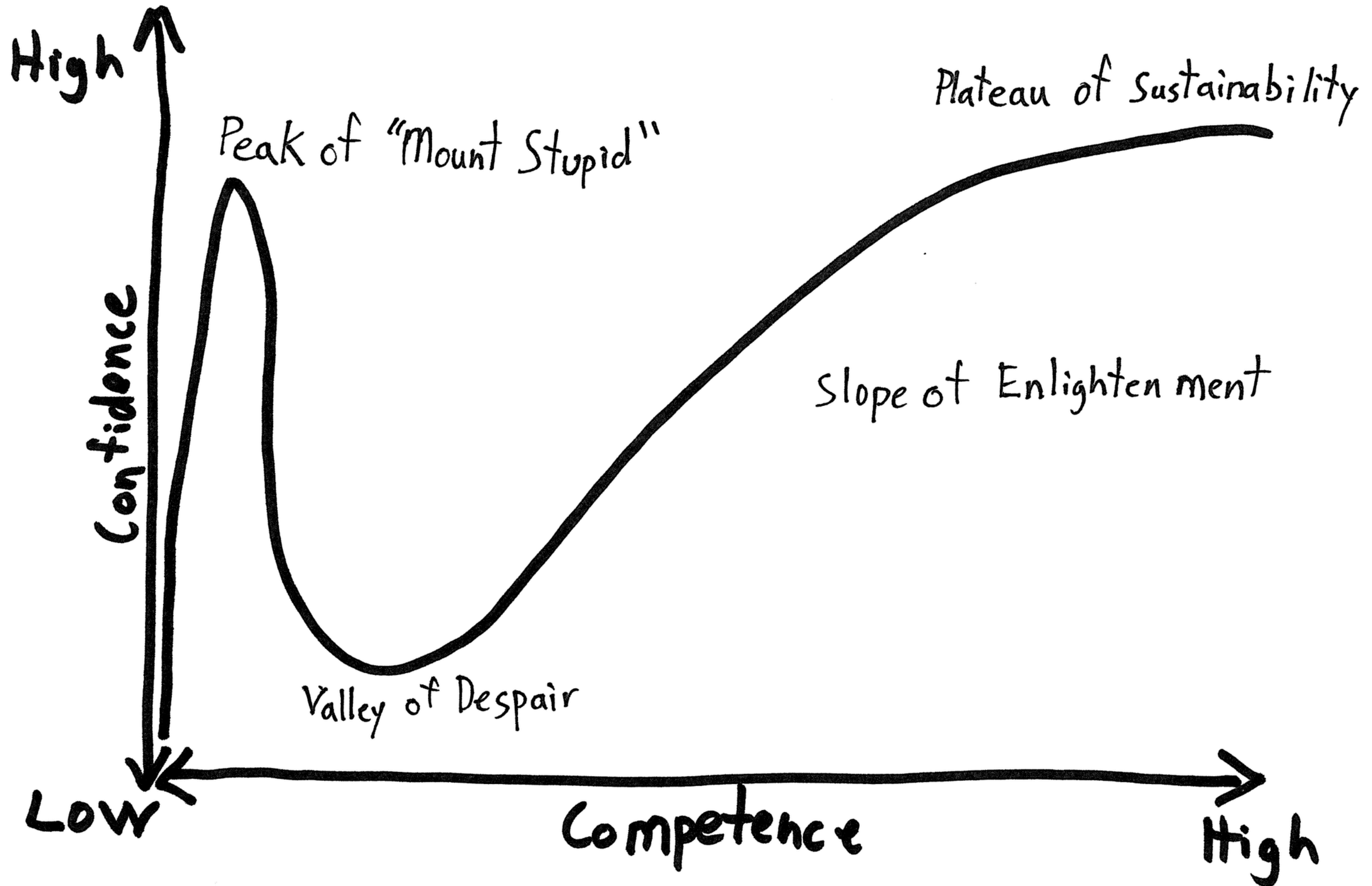
"Prediction engine"

"Pattern
recognition"

"We've always given
tools personalities. Now
the tool is good enough
to fool us."



Dunning-Kruger Effect



"AI CAN PROCESS YOUR THINKING, BUT
IT CANNOT REPLACE YOUR JUDGMENT."

CAPTURE → RESEARCH → STRUCTURE

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BAD PROMPT:

MISSING STRUCTURE. MISSING
PRIORITIES. FORCES THE AI TO
GUESS.

GOOD PROMPT:

CLEAR ROLE. CLEAR TASK. CLEAR
OUTPUT. TELLS THE AI WHAT
MATTERS.

BAD PROMPT:

SUMMARIZE THIS MEETING

GOOD PROMPT:

YOU ARE A HEALTHCARE OPERATIONS MANAGER.

SUMMARIZE THE FOLLOWING MEETING TRANSCRIPT.

FOCUS ON:

- KEY DECISIONS MADE
- ACTION ITEMS
- RISKS OR FOLLOW-UPS

FORMAT THE OUTPUT AS:

1. BRIEF SUMMARY (3-5 SENTENCES)
2. ACTION ITEMS WITH OWNER AND DUE DATE
3. OPEN QUESTIONS OR RISKS

CAPTURE → RESEARCH → STRUCTURE

BAD PROMPT:

Conversation Summary (Bad Prompt)

1. Mother's Day Ideas (Church Context)

Experiential ideas:

- Iced tea bar with treats (similar to "high tea" but more accessible)
- Coffee bar with a local vendor or pop-up setup

Simple / low-cost options:

- Small chocolate bundles or custom-labeled candy bars
- Mother's Day cards (placed in men's restrooms to encourage participation)

Mid-range gifts:

- Custom tote bags or tumblers (focus on quality)
- Notebooks or journals with custom labels

Creative ideas:

- Recipe-themed gifts (e.g., sheet pans with meal ideas)
- Book giveaways (faith-based, "choose your own" style)
- Interactive elements (spinning wheel, Plinko, games)

Key principle:

- Avoid anything that feels cheap; prioritize quality and thoughtfulness
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2. Approach to Mother's Day Messaging

- Keep messaging simple and not overcomplicated
 - Acknowledge difficult family situations without overemphasizing them
 - Avoid excessive caveats that make the experience emotionally heavy
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3. AI in Healthcare and Productivity

Common current uses:

- Automated charting from recorded patient visits
- AI-assisted medical research and decision support

More impactful (underutilized) uses:

- Recording meetings and generating structured summaries
- Creating SOPs (standard operating procedures)
- Documenting workflows and decision-making processes

- Turning conversations into actionable documents

Example workflow:

1. Record a meeting
2. Transcribe it
3. Use AI to summarize and extract action steps
4. Refine output
5. Create a reusable document

Other productivity uses:

- Summarizing meetings immediately after they happen
- Tracking personal details for better follow-up
- Using AI as a thinking partner to refine ideas

Advanced use:

- Custom GPTs trained on internal documents or industry knowledge
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4. Communication Coaching with AI

- Improve how professionals communicate:
 - Doctors explaining things to patients
 - Managers communicating with staff
 - Handling sensitive conversations more effectively

Core idea:

- Reviewing and refining communication leads to better outcomes over time
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5. Personal Life Updates

- Frequent travel created family strain
 - Moving to Omaha with housing secured
 - School decisions made (public school, strong district)
 - Church selected and summer plans arranged for kids
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6. Education Discussion (ACT / SAT)

- Considering early ACT testing for benchmarking

Insights:

- Tests measure reasoning and efficiency, not just knowledge
- ACT vs SAT:

- ACT: more time, more reading-focused
 - SAT: more grammar-focused
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Overall Themes

- Thoughtful planning over cheap execution
- Practical use of AI for real productivity gains
- AI as a tool for refining thinking, not replacing it
- Importance of communication improvement
- Balancing work responsibilities with family life

GOOD PROMPT:

Conversation Summary (Good Prompt)

Mother's Day Ideas Summary

Core Experience Ideas

- **Iced Tea Bar (High Tea Style)**
Iced tea focus instead of hot tea, paired with light snacks (sandwiches, pastries).
Option to partner with a local vendor for setup and batching.
- **Coffee Bar**
Bring in a local coffee shop with a mobile setup or run a simple pop-up in the parking lot.

Simple, High-Impact Giveaways

- **Chocolate bundles** (2–3 tied together with a tag)
- **Custom-wrapped candy bars**
- **Mother's Day cards in men's restroom** (easy, inexpensive, very effective)

Higher-Quality Gift Options

- **Custom canvas tote bags** (durable, reusable, not cheap quality)
- **Custom tumblers** (worth investing in better quality)
- **Notebooks/journals** (Moleskine-style, can add custom labels or branding, tie into Bible study habits like SOAP)

Book Giveaway Option

- Offer a **small curated selection of books** people can choose from:
 - *Ruthless Elimination of Hurry*
 - *Liturgy of the Ordinary*
 - Possibly 1–2 additional titles
- Optional: add a simple game element (spinner, Plinko-style, etc.) for engagement

Creative / Memorable Idea

- **"Sheet Pan Dinner" Concept**
Distribute sheet pans with printed favorite recipes from staff
 - Practical and relatable ("what's for dinner?" problem)
 - Can include light humor while still being genuinely useful

Guiding Principles

- Avoid anything that feels cheap or cut-down
- Better to execute one thing well than several things poorly
- Prioritize items people will actually use or experiences they'll remember

Service Approach

- Stay in current sermon series (James)
- Keep Mother's Day integration simple and natural
- Avoid overcomplicating or over-contextualizing

Suggested Priority (If Narrowing Down)

1. Beverage bar (iced tea or coffee)
2. Cards in restroom (easy win)
3. One quality takeaway item (tote, tumbler, or notebook)

CAPTURE → RESEARCH → STRUCTURE

1. Audio/Transcript

2. Documents

3. Email

5. perplexity.ai

6. claude.ai

7. chatgpt.com

CLAUDE PROJECTS:
A PRACTICAL GUIDE



STANDARD OPERATING
PROCEDURE (SOP)
FRAMEWORK



bitly

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