LAKEFISH GROUP / SAMPLE EDITION

Harborline Packaging AI Playbook

Company insight. Complete prompts. A useful result you can check.

This is a sample. Harborline Packaging, its people and every figure inside are invented to show what each company receives in a Lakefish Group AI workshop. A real edition is built from public research on your company and from what your attendees say they want to take away.

Facilitated by Jon Lakefish | LakefishGroup.com

START HERE

Your company. Your next useful result.

Find your name below, open one of the exercises recommended for you, and copy the full text from BEGIN PROMPT through END PROMPT into a new chat in the AI tool you already use. Every exercise carries enough practice data to work without uploading anything.

What is inside

- Company research, drawn from public sources and cited
- A SWOT that separates what the evidence shows from what still needs testing
- A personal starting path for each attendee
- Six exercises with complete prompts, a way to check the first answer, and two follow-ups each
- A four-week plan for turning one exercise into a small pilot

A 25-minute working round

3 minutes: choose an exercise. 10 minutes: run the full prompt. 7 minutes: check the result and try a follow-up. 5 minutes: write down one useful action, one correction, and one thing that still needs a person's judgment.

Using your own data

Practice data in this playbook is fictional. When you are ready, attach files your company has approved, tell the AI to replace the sample completely, and never blend practice rows with real results. Check important numbers and decisions against the original records.

COMPANY RESEARCH

The business behind the work

Harborline Packaging is a fictional, family-owned maker of corrugated boxes and retail displays serving food, beverage and e-commerce customers in the Upper Midwest. It runs one plant, quotes most jobs within two days, and competes on short lead times and design help. [S1, S2]

In a real edition this page summarizes what your company publishes about itself: products, markets, locations and stated strengths, each tied to a numbered source. It never guesses at private revenue, customers or problems.

A SWOT to challenge

Strengths / evidence	Potential weaknesses / test these
• Short quoted lead times are a stated selling point. [S1] • In-house structural design supports custom work. [S2]	• Hypothesis: quoting depends on two experienced estimators. • Hypothesis: design requests arrive with missing dimensions.
Opportunities / experiments	**Threats / risks to evaluate**
• Use AI to turn a customer email into a complete quote request. • Draft first-pass replies for late-order questions.	• An AI-written lead time could be read as a promise. • Paper price swings can erase margin on fixed quotes.

Strengths are read alongside their public evidence. Weaknesses, opportunities and threats are hypotheses for your leadership to confirm or reject, not findings.

YOUR WORKSHOP PATH

A starting point for each person

Each attendee gets a page like the three below, based on their role and what they told us at registration.

Dana Whitfield | President
What you asked to take away: A way to decide where AI is worth the effort
Platforms listed at registration: ChatGPT, Copilot

- 05 / Size an automation idea with transparent math
- 06 / Compare two AI answers before using either

Marcus Lee | Operations Manager
What you asked to take away: Less time chasing order status
Platforms listed at registration: Copilot

- 02 / Build a late-order risk review
- 04 / Turn a messy procedure into a checklist

Priya Raman | Sales and Marketing Coordinator
What you asked to take away: Faster quotes and better follow-up
Platforms listed at registration: ChatGPT, Claude

- 01 / Turn a customer email into a complete quote request
- 03 / Plan six weeks of customer content from approved sources

Your exercise map

- 01 / Turn a customer email into a complete quote request
- 02 / Build a late-order risk review
- 03 / Plan six weeks of customer content from approved sources
- 04 / Turn a messy procedure into a checklist
- 05 / Size an automation idea with transparent math
- 06 / Compare two AI answers before using either

This sample prints exercises 01 and 06 in full. A real edition prints all six.

EXERCISE 01 / 06

Turn a customer email into a complete quote request

Suggested for: Priya Raman. Speeds up quoting without guessing at missing details.

BEGIN PROMPT / COPY THROUGH END PROMPT

```
I am in Jon Lakefish's AI workshop. Act as my practical business analyst and working partner for Harborline Packaging. My objective is: turn a customer email into a complete quote request. Explain unfamiliar terms briefly and produce the actual working deliverable, not advice about how I could make one.

COMPANY CONTEXT: Harborline Packaging makes corrugated boxes and retail displays. Quotes need dimensions, board grade, print, quantity and delivery date.

FICTIONAL PRACTICE DATA (invented for this exercise; use only this data):
Customer email: 'Need 5,000 shipper boxes for our new 12-pack, roughly 16 x 12 inches, two-color logo, same board as last time. Launch is early March. Can you also do a counter display?' No height, board grade on file, ship-to address or display quantity is given.

YOUR ASSIGNMENT: Build a quote-request table with each required field, the value given, and whether it is confirmed, assumed or missing. Write the five questions to send the customer, most important first. Draft a friendly reply that asks them and promises nothing on price or lead time. List what an estimator must decide that AI should not.

WORKING RULES: First restate the decision and list any missing or conflicting facts. Keep going with the data supplied and ask at most three questions, only if a missing fact blocks the result. Keep supplied facts, calculations, assumptions and recommendations separate. Do not invent customers, capabilities, approvals, savings or sources. Show your arithmetic where numbers matter. Finish with a short decision brief: the next step, who owns it, how we will know it worked, and what would change your recommendation. Then review your own answer skeptically and fix anything unsupported.
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END PROMPT

Check the first result

- Height and board grade are flagged as missing, not guessed.
- The reply makes no price or delivery promise.
- The counter display is treated as a separate request.

Follow-ups

- Rewrite the reply for a customer who is in a hurry and reads on a phone.
- Turn the table into a reusable intake checklist for every new quote.

EXERCISE 06 / 06

Compare two AI answers before using either

Suggested for: Dana Whitfield, Marcus Lee, Priya Raman. Builds the habit of checking an answer instead of trusting the first one.

BEGIN PROMPT / COPY THROUGH END PROMPT

```
I am in Jon Lakefish's AI workshop. Act as my practical business analyst and working partner for Harborline Packaging. My objective is: compare two ai answers before using either. Explain unfamiliar terms briefly and produce the actual working deliverable, not advice about how I could make one.

COMPANY CONTEXT: Harborline Packaging quotes most jobs within two days and competes on short lead times.

FICTIONAL PRACTICE DATA (invented for this exercise; use only this data):
Source facts: 5,000 boxes requested; height unknown; board grade unknown; launch early March; estimator review pending. Answer A: 'We can deliver 5,000 boxes in ten days at 15 percent below your last order.' Answer B: 'We can quote within two days once we have the box height and board grade. Early March looks workable, subject to an estimator confirming capacity.'

YOUR ASSIGNMENT: Score both answers from 0 to 2 on evidence, arithmetic, honesty about what is unknown, and usefulness, and define each score. Name every unsupported claim in A and every remaining gap in B. Write a better final answer a salesperson could send. Then give me a one-page worksheet three colleagues can use to compare answers from different AI tools fairly.

WORKING RULES: First restate the decision and list any missing or conflicting facts. Keep going with the data supplied and ask at most three questions, only if a missing fact blocks the result. Keep supplied facts, calculations, assumptions and recommendations separate. Do not invent customers, capabilities, approvals, savings or sources. Show your arithmetic where numbers matter. Finish with a short decision brief: the next step, who owns it, how we will know it worked, and what would change your recommendation. Then review your own answer skeptically and fix anything unsupported.
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END PROMPT

Check the first result

- Answer A's delivery and price claims are rejected as unsupported.
- Answer B is improved, not simply declared the winner.
- The worksheet compares answers, not whole AI products.

Follow-ups

- Add a deliberately subtle error to one answer and see whether your colleagues catch it.
- Make the worksheet fit on half a page.

AFTER THE WORKSHOP

Turn one exercise into a small pilot

Days 1 to 3	Pick one frequent task and one owner. Write down how long it takes today and the usual mistake.
Days 4 to 7	Run the prompt on five to ten real, approved examples, including hard ones. Record time spent reviewing and every correction.
Week 2	Compare total effort, including review, with the old way. Count useful results, not fast ones.
Weeks 3 to 4	Keep going only if it passes the quality and time bar you set. Write down the prompt, the inputs, the reviewer and when to stop.

Sources and notes

S1 and S2 stand in for the numbered public sources a real edition lists, such as a company's products page and its about page, each with a link and the date it was checked.

About this sample

Harborline Packaging is not a real company. Dana Whitfield, Marcus Lee and Priya Raman are invented. A real AI Playbook is prepared by Jon Lakefish before each workshop for every company in the room, with a section for each team member attending, and is given only to that company.

Bring the AI Playbook to your team
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