SAMPLE AGENDA

AI for Clinic Teams

A practical, jargon-free workshop for everyone who works in a clinic. What AI tools can and cannot do with the work the team already does, how to use them safely with patient information, and how to tell a useful tool from a risky one.

FORMAT	LENGTH	TRACK
Workshop	**Half day**	**Learn**

This is a sample agenda. Every session is tailored to the client: modules, timings and exercises change with your organization, your systems and the people in the room.

Session goals

1. Everyone can explain, in plain words, what the common AI tools do and where they fail.
2. The team agrees simple rules for safe use with patient information.
3. The team leaves with a short list of repetitive tasks worth looking at, written by the people who do them.

Who it is for

A whole clinic team together: clinicians, nurses, front office, billing and the practice manager. Eight to twenty people.

Before the session

- No technical background. Curiosity and a willingness to say what wastes your day.
- Any existing policy on staff use of AI tools, if there is one.

Schedule

TIME	MODULE
0:00 – 0:30	**What these tools actually do** Drafting, summarizing, sorting, extracting, predicting. Each shown on a synthetic clinic example the team will recognize.
0:30 – 1:10	**Where they go wrong** Confident wrong answers, missing context, and quiet drift. How to spot each one. Hands-on with planted errors.
1:10 – 1:25	*Break*
1:25 – 2:10	**Safe use with patient information** What may never go into a public tool, what a reviewed tool changes, and the team's own rules, drafted together.
2:10 – 3:00	**Where the repetitive work is** Each role lists the tasks that eat their day. The group groups and ranks them. The list belongs to the team.
3:00 – 3:30	**What a reviewed workflow looks like** A walk through one task from messy input to reviewed output, and the role a person keeps in it.
3:30 – 4:00	**Close** The team agrees its rules, its list and who holds them.

Hands-on exercises

- Spotting planted errors in synthetic AI output, by role.
- Drafting the team's own safe-use rules.
- Building the team's ranked list of repetitive tasks.

You leave with

- The team’s safe-use rules, in one page
- A ranked list of repetitive tasks written by the people who do them
- A plain-language glossary of the terms vendors use
- A one-page guide to spotting unreliable output

Safe use

Sessions use synthetic or de-identified material only. Please do not bring patient information, real message threads or live system access into the room. Nothing in a session is clinical, legal or compliance advice, and no tool is endorsed or evaluated as safe for clinical use by taking part.