

LEVEL UP!

Your Strategic Roadmap from AI Prompts to AI Orchestration

Calvin Truong | Intelligent Delivery: The Next Era of Strategy & Analysis with AI

LEVEL 1

LEVEL 2

LEVEL 3

LEVEL 4

YOUR SPEAKER

Calvin Truong

Business Analyst
10+ years in Business Analysis
Self-taught in AI

*You don't need to code to orchestrate.
I'm proof.*

WHO THIS IS FOR

If AI feels like it's for someone else — this talk is for you.

You've used ChatGPT or Copilot, but aren't sure you're getting the most out of it.

You can see AI changing your industry, but don't know where you fit in the picture.

You want a practical roadmap — not theory, not hype.

You'll leave with practical takeaways at every level — starting today.

THE FOUR LEVELS OF AI FLUENCY

Where do you sit today — and where do you want to go?



Most attendees today are between Level 1 and Level 2 — that's exactly where we start.

LEVEL 1

The AI-Assisted Professional

THE TASK PHASE

Focus: Personal Efficiency

Key Achievement: Administrative Agility — reclaim 5-10 hours from low-stakes writing tasks



You're using AI as a high-powered Copy-Paste.

CRIT: Turn AI into a strategic thought partner.

C CONTEXT

Give AI your world. Share background, goals, audience, and the situation so it fully understands the environment before it responds.

R ROLE

Assign a specific perspective or expertise. Tell AI who to be — a skeptical CFO, a senior BA, a market strategist — to shape tone and approach.

I INTERVIEW

Ask AI to interview you first, one question at a time. This surfaces missing details and forces clearer thinking before any output is generated.

T TASK

Define exactly what you want. Be specific about the deliverable, format, length, and success criteria so AI knows what 'done' looks like.

LEVEL 1 // CRIT IN PRACTICE

Scenario: You need to present a project status update to an executive who wasn't in last week's meeting.

C CONTEXT

I am a project manager at a mid-size insurance company. Our system migration project is 3 weeks behind schedule due to a vendor delay. My VP of Operations was traveling and missed the last two status meetings.

R ROLE

Act as a senior business communications consultant who specializes in executive-level project reporting for regulated industries.

I INTERVIEW

Ask me up to 3 questions, one at a time, to understand what the VP needs to know and what decisions — if any — she needs to make.

T TASK

Write a concise 1-page executive status update that covers where we are, why we're behind, what we're doing about it, and what I need from her — in plain business language.

Notice the Interview step — it turns AI into a thought partner before a single word of the update is written.

CREATE: Get sharper, more relevant results every time.

C CHARACTER	Tell AI what role to take on. A specific character shapes tone, vocabulary, and perspective — preventing generic, one-size-fits-all responses.
R REQUEST	Be clear and specific about what you want AI to produce. Include enough context and key details — vague requests produce vague results.
E EXAMPLES	Provide examples of the tone, style, or format you want. Even one example dramatically helps AI match your expectations.
A ADJUSTMENTS	Refine how AI presents information. Include constraints upfront or add them when re-prompting: format, length, tone, what to avoid.
T TYPE OF OUTPUT	Specify the exact format and length you need — a table, a paragraph, a bullet list, 200 words — so the result is ready to use.
E EXTRAS	Add any final instructions to guide quality: 'Show your reasoning,' 'Cite your sources,' or 'Flag anything you are uncertain about.'

LEVEL 1 // CREATE IN PRACTICE

Scenario: You need to write a business case for adopting a new requirements management tool.

C CHARACTER	Act as a senior business analyst with experience building business cases for technology investments in financial services companies.
R REQUEST	Write a business case recommending we adopt a new requirements management tool to replace our current spreadsheet-based process.
E EXAMPLES	The tone should match this sample from a previous approved proposal: clear, direct, and focused on business value — not technical specs.
A ADJUSTMENTS	Avoid technical jargon. Lead with cost and time savings. Do not include implementation timelines — that comes in a separate document.
T TYPE OF OUTPUT	A one-page executive summary with three sections: Problem, Proposed Solution, and Expected Business Impact. Use short paragraphs, no bullet lists.
E EXTRAS	Flag any assumptions you are making about our current process or team size, so I can verify them before submitting.

Every element earns its place — notice how the Extras step protects you from AI making assumptions you can't verify.

LEVEL 2

The AI-Augmented Professional

THE WORKFLOW PHASE

Focus: Quality and Critical Thinking

Key Achievement: 2x Critical Thinking Multiplier



You're not asking AI to write for you — you're asking it to think with you.

From prompting to thinking together.

WHAT IS CONTEXT ENGINEERING?

Context Engineering means giving AI the right information, role, constraints, and perspective to generate outputs that actually match what you need.

Level 1: "Write me a summary."

Level 2: "You are a skeptical CFO reviewing this plan. Find the three biggest financial risks and explain why they could derail the project."

TRY THIS

Stress-test your logic

"Find the holes in this risk management plan."

Multi-persona review

"Now respond as a skeptical developer. Now as a nervous end-user."

Devil's advocate

"Make the strongest argument against my recommendation."

LEVEL 2 // CONTEXT ENGINEERING IN PRACTICE

Scenario: You're a BA reviewing a vendor's proposed solution against your business requirements.

LEVEL 1 PROMPT

"Does this vendor proposal meet our requirements?"



LEVEL 2 PROMPT

"You are a senior BA who specializes in vendor evaluation. I will paste our requirements document and the vendor proposal. Identify any gaps where the proposal does not fully address a requirement, flag any ambiguous language that could become a contractual risk, and rank the gaps by business impact."

WHAT CHANGED

Role assigned

AI now evaluates as a senior BA, not a generic assistant

Task scoped precisely

Three specific outputs: gaps, risks, and a priority ranking

Stakes made explicit

"Contractual risk" tells AI what level of precision matters

The shift from thinking with AI to building with it.

Level 2 made you 2x smarter. Level 3 makes you 10x more productive — because the work happens whether you're at your desk or not. The bridge is recognizing that your best Level 2 workflows are just automation waiting to happen.

01

Notice what you repeat

Every time you use AI the same way twice — same role, same task, same format — that is a workflow. Start writing them down.

02

Chain your prompts intentionally

Break complex tasks into steps: research, summarize, draft, review. Each output feeds the next input.

03

Ask: what would need to happen for this to run without me?

That question is the gateway to Level 3. You do not need to know how to build it yet — just start seeing the possibility.

LEVEL 3

The AI-Orchestrator

THE SYSTEM PHASE

Focus: Automation and Scale

Key Achievement: Unlocking "The Multiplying Professional"



You've stopped doing the work one prompt at a time. You build systems that do the work for you.

If you can draw a flowchart, you can build an agent workflow.

REAL EXAMPLE: StoryGuard

I built a multi-agent workflow that automatically generates AI-ready user stories from requirements. What used to take hours now runs on its own — without me sitting at my desk.

Start Here: Make.com

BEGINNER ON-
RAMP

No installation required. Drag-and-drop automation. If you've never built a workflow before, start here. Build something simple — a trigger that fires, an AI step that processes, an output that lands somewhere useful.

Graduate To: n8n

POWER TOOL

More flexibility, more power, more control. Once you're thinking in workflows, n8n lets you go deeper. Open-source, self-hostable — this is where I personally build my agent systems.

Three moving parts. Infinite combinations.

An agent workflow is a sequence of automated steps where AI does the thinking at each stage. You define the process once — then it runs on its own, every time, without you.

01 TRIGGER

Something kicks it off

A new email arrives. A form is submitted. A file lands in a folder. A schedule fires at 9am Monday.

02 AI AGENT(S)

AI does the thinking

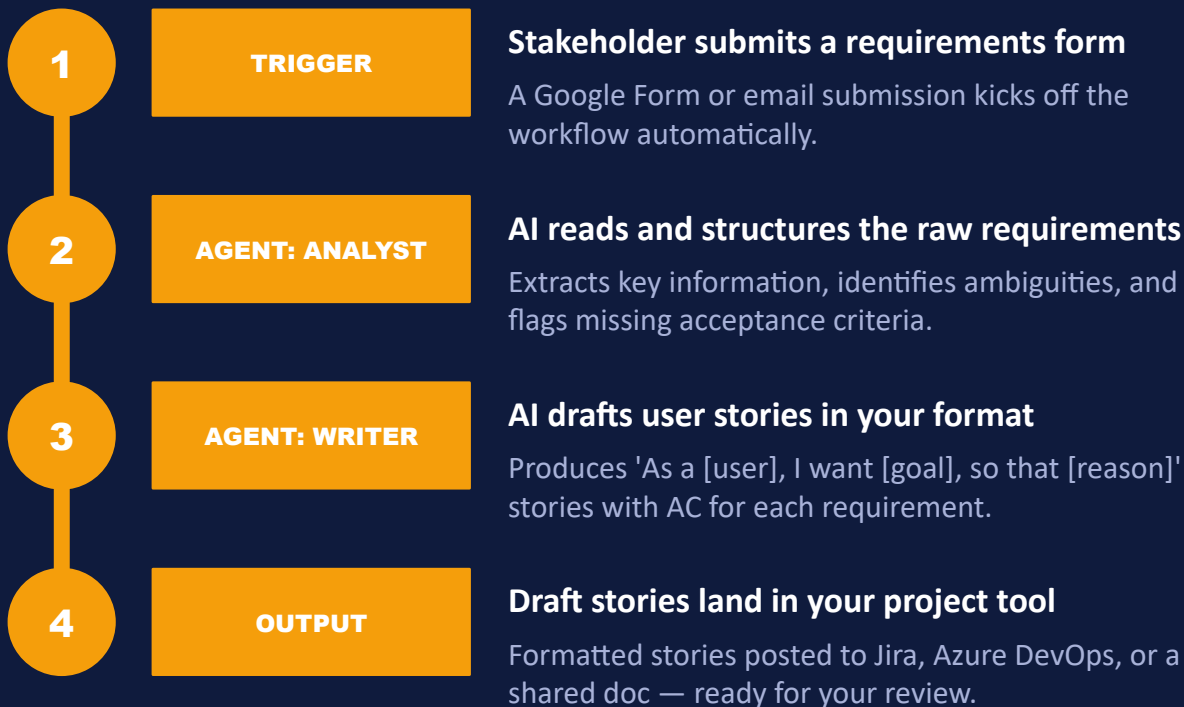
One or more AI steps process the input — reading, analyzing, summarizing, drafting, deciding, routing.

03 OUTPUT

Something useful happens

A document is created. A message is sent. A record is updated. A report lands in your inbox.

Requirements Intake to Draft User Stories — automated.



THE PAYOFF

Hours of requirements grooming



Minutes of review

And it runs every time a requirement comes in — without you.

You don't build this in a day. You build it once — and it works forever.

The shift from automating work to redesigning it.

Level 3 gave you back your calendar. Level 4 gives your organization a competitive edge that didn't exist before you walked in. The bridge is a single shift in how you see problems — from 'how do I do this faster?' to 'should this process exist at all?'

01

Ask who else benefits from your workflow

If a system you built saves you 3 hours a week, it might save your whole team 30. Start thinking in organizational impact, not personal efficiency.

02

Look upstream and downstream

Every workflow has inputs that come from somewhere and outputs that go somewhere. Start questioning whether those handoffs even need to exist.

03

Stop fitting AI into old processes

The Level 4 question is not 'how can AI help with this?' It is 'if I built this from scratch today with AI, what would it look like?'

LEVEL 4

The AI-Native Leader

THE STRATEGIC PHASE

Focus: Business Transformation

Key Achievement: "The Rule Rewriter" — you don't just save hours, you retire entire job functions.



You don't start here — but every level you climb makes this possible.

Stop asking: "How can AI help?"

OLD QUESTION

"How can AI help with this process?"

LEVEL 4 QUESTION

"If I built this from scratch today with AI, what would it look like?"

The next slide shows you what that question looks like when a BA actually answers it.

Same problem. Completely different question.

SCENARIO: Your organization's project intake process takes 3 weeks from request to approved charter.

LEVELS 1-3 APPROACH

Use AI to draft the charter faster

Templates, prompts, and automation cut the writing time down.

Automate the approval reminders

A workflow pings stakeholders so nothing sits in an inbox.

Summarize intake requests automatically

AI reads submissions and produces a structured brief.



LEVEL 4 QUESTION

"Why does project intake take 3 weeks at all?"

If AI can read a request, assess feasibility, draft a charter, route it for approval, and post it to your PM tool — what part of this process actually needs 3 weeks? What part needs a human at all?

Levels 1-3 make the old process faster. Level 4 asks whether the old process should exist.

THE JOURNEY IS THE POINT

You don't need to reach Level 4 today. You just need to take the next step.



Every hour you reclaim from low-stakes writing is an hour you give back to the work that actually matters.



Every workflow you automate is a system that works for your organization long after you've moved on to the next problem.



Every process you redesign from scratch is proof that the way things have always been done was never the only option.

YOUR ROADMAP

Every level is a real achievement. Start where you are.

LEVEL 1

AI-Assisted Professional

ACHIEVEMENT

Administrative Agility

→ Start here.
Learn the basics.

LEVEL 2

AI-Augmented Professional

ACHIEVEMENT

2x Critical Thinking

→ Think with AI,
not just prompt it.

LEVEL 3

AI-Orchestrator

ACHIEVEMENT

The Multiplying Professional

→ Build systems
that work for you.

LEVEL 4

AI-Native Leader

ACHIEVEMENT

The Rule Rewriter

→ Redesign the
business itself.

YOUR NEXT MOVE

Don't wait for Level 4. Start with one better prompt.

- 1 Pick ONE task you do repeatedly. Prompt it better.
- 2 Ask AI to stress-test your next decision or plan.
- 3 Map one repetitive workflow. Then try Make.com.
- 4 Ask: "If I built this from scratch with AI today — what changes?"

Calvin Truong

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Connect with me on LinkedIn and tell me which level you're starting at.

LINKEDIN



linkedin.com/in/calvin--truong

STORYGUARD ON GITHUB



github.com/calvintruong-AI/storyguard

Thank you for being here today.