



WELCOME TO THE
MERION RESIDENTIAL
AI PILOT GROUP

JULY 2026

DISCLAIMER

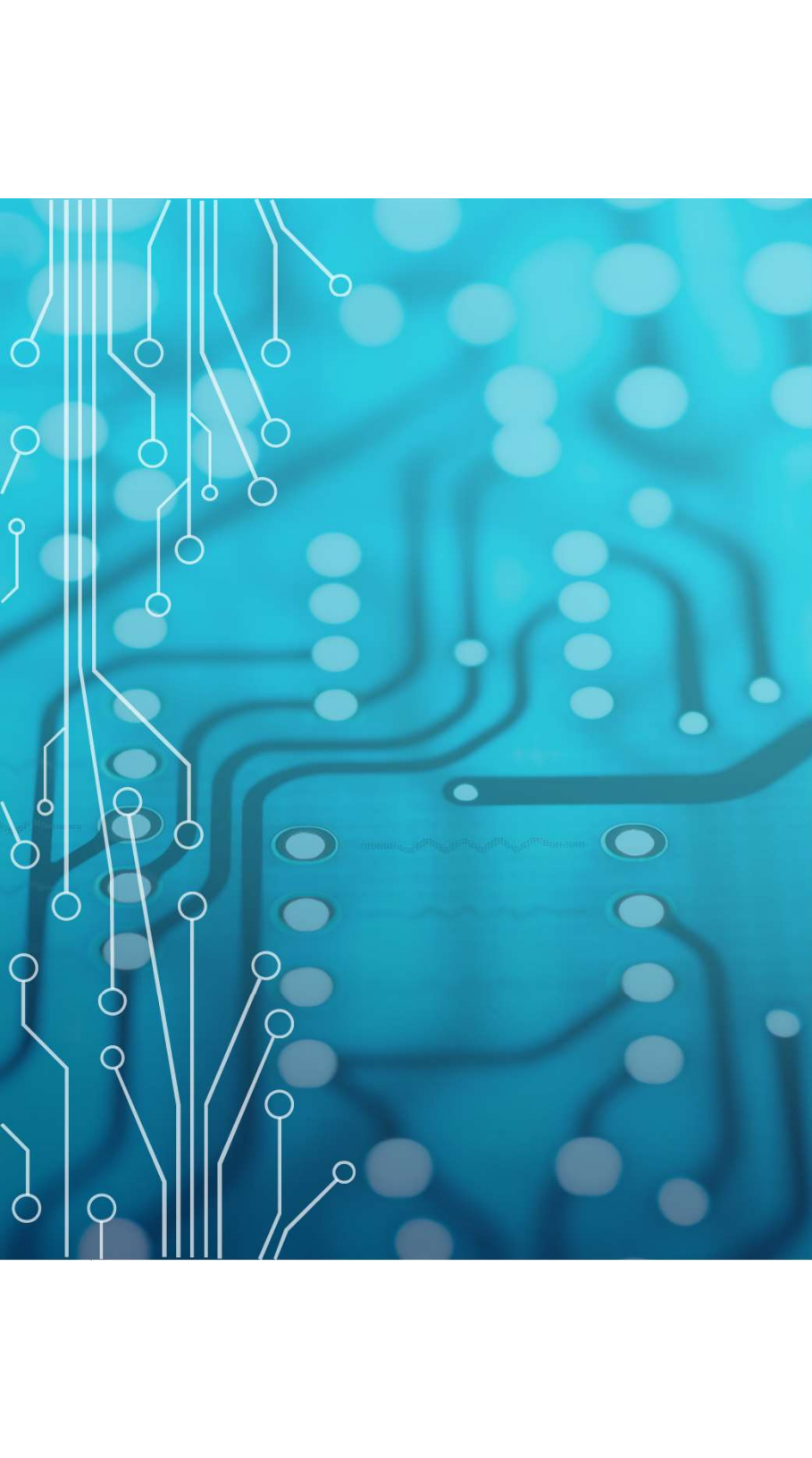
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AGENDA

- What is Artificial Intelligence?
- What is the AI Pilot Group?
- Pilot Period
- AI Applications
- Copilot / Claude
- The Assignment
- Safe Usage
- Other Usage Rules
- Documenting Your User Experience
- Post-Sandbox Time
- Common AI Terminology
- Technical Support
- Thank You / Questions

WHAT IS ARTIFICIAL INTELLIGENCE?

- Artificial intelligence (AI) is a branch of computer science focused on building systems capable of performing tasks that typically require human cognition.
- This includes processes like learning from data, recognizing speech, understanding natural language, perceiving environments, and making decisions without explicit, step-by-step programming.



WHAT IS THE MERION RESIDENTIAL AI PILOT GROUP?

- A small, carefully selected employee group chosen to “test” potential AI applications (Copilot and Claude) while you perform your work before an AI solution is selected and rolled out company wide.





WHAT IS THE AI PILOT GROUP TEST PERIOD?

- The **Test Period** will be from **Monday, 7/13/26 through Friday, 7/24/26.**



Microsoft
Copilot



Claude

WHAT AI APPLICATIONS WILL YOU USE?

- You will be provided with licenses for Copilot and Claude.
- A license is per user (not per device).

AI UNDER REVIEW @ MERION RESIDENTIAL

- **Microsoft Copilot** is an AI-powered assistant designed to boost productivity and streamline workflows.
- It integrates advanced Large Language Models (LLMs) with web data and your work environment to help you write emails, brainstorm ideas, analyze data, generate images, and summarize meetings.
- **Claude AI** is a family of proprietary large language models (LLMs) and a conversational AI assistant developed by the research company Anthropic.
- It is designed to act as a highly capable, safe, and articulate digital collaborator for tasks like writing, coding, analyzing data, and processing massive documents.



WHAT IS THE ASSIGNMENT?

- You will be asked to “play around” (in a controlled manner) with the AI tools as you perform your work during the test period.
- You will be provided with a suggested list of work tasks that you can perform to explore and “test” the AI application.
 - Find the AI Sandbox Time Protocol information sheet on <https://my.merionresidential.com/> > AI Pilot Group.
- We are asking that you commit to spending up to 4 hours per week during the pilot period (7/13 – 7/24) for “testing” the AI tool (*since you will be asked to perform work tasks with the AI tool, most of your time “testing” the tool should occur during the workday*).

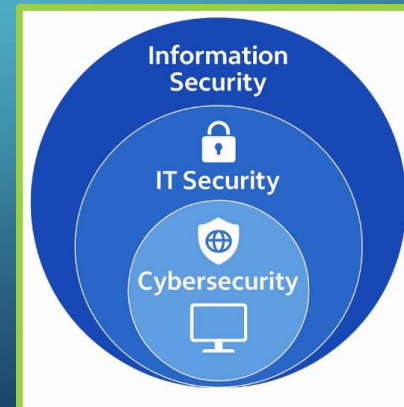
GETTING STARTED

- Think about the pain points and daily frustrations in your role.
- Pinpoint the tasks that take longer than they should.
- Explore where AI can help streamline that work.
- Need a starting point? Two resources are provided:
 - **Task Manager** (Excel): a log of your tasks.
 - **Personal Assistant Project Instructions** (Word): a ready-made prompt for your AI.



SAFE USAGE PROTOCOL

- It is important to note that you should NEVER enter personally identifiable information (PII) or other sensitive data like individual leases, business agreements, specific work order history, or company financial information or business records into an AI application.



OTHER AI USAGE RULES

- ✓ AI assists human decision-making and accelerates workflows but does not replace human accountability. **Humans must always review, edit, and approve AI outputs.**
- ✓ AI can be a personal productivity partner by handling routine administration so that you can focus on other high-value, strategic work.

DOCUMENTING YOUR USER EXPERIENCE

✓ As you use the “sandbox time” to dabble with AI, please document the tasks that you perform and measure how much time is saved so that we can formally track and assess the value of the tool.

- *Is the information generated by AI reliable?*
- *If you submit a task to the AI on different days, are the answers accurate, relevant, and properly formatted each time?*
- *Does the AI break privacy rules like it shares private data or does it mention competitors?*
- *Is AI able to correct its mistakes?*

- *Does using AI save time?*
- *Can the AI application handle repetitive prep work so that you can focus on work that requires your own judgement and creativity?*
- *How long did a specific task take to complete before using AI versus how long it took with it?*
- *Overall, does using AI make your job easier or more efficient?*
- *Is there a way to cross check the information AI generates against trusted sources?*

During the Test Period, we want you to document YOUR user experience in terms of the functionality (i.e., accuracy) and overall user experience (i.e., ease of use) of using each AI tool.

AFTER THE SANDBOX

- You will be asked to provide formal feedback about your experience using each AI tool, Copilot and Claude, to perform your work after the AI Pilot Group Test Period.



COMMON AI TERMINOLOGY

- **AI (Artificial Intelligence):** A broad field of computer science focused on creating machines capable of performing tasks that typically require human intelligence, such as learning, reasoning, and problem-solving.
- **AI Agent:** An advanced AI that doesn't just answer questions, but autonomously plans, makes decisions, and executes multi-step tasks on your behalf (e.g., booking a trip or updating a database).
- **AI Chat:** An AI chat is an interactive conversation with an artificial intelligence system. Instead of clicking preset buttons, you type or speak to the AI, which uses advanced language models to understand your intent and respond naturally. You can use these tools to brainstorm ideas, write content, summarize documents, or get coding assistance.
- **AI Model:** An AI model is a software program trained on vast amounts of data to recognize patterns, make decisions, or generate new content. Instead of following hard-coded rules, it learns from examples to autonomously predict outcomes or perform complex tasks like analyzing language, recognizing images, or writing code.

COMMON AI TERMINOLOGY

- **Generative AI:** AI designed to create *new* content (text, images, audio, video, or code) rather than just analyzing existing data.
- **Hallucination:** An error where an AI confidently invents false, misleading, or made-up information, presenting it as fact.
- **LLM (Large Language Model):** A massive AI model trained on vast amounts of text. It understands grammar, context, and concepts, allowing it to converse naturally and write human-like text (e.g., GPT-4, Claude, Gemini).
- **Machine Learning (ML):** A subset of AI where computers learn from historical data and identify patterns without being explicitly programmed to do so.
- **Multimodal Model:** An AI that can process and combine different types of data—meaning it can look at pictures, listen to audio, and read text all at once.
- **Prompt Engineering:** The art and science of refining your prompts to get the exact, high-quality output you want from an AI.

COMMON AI TERMINOLOGY

- **Prompt:** The instruction, text, image, or code you feed into an AI system to tell it what to do.
- **RAG (Retrieval-Augmented Generation):** A technique that connects an AI to external, private databases. Instead of relying solely on its internal training, it fetches the correct data first and then generates an answer.
- **Token:** The basic unit of data processed by language models. Tokens can be whole words or parts of words. Roughly speaking, 1 token is about 4 characters or 0.75 words.



TECHNICAL ISSUES / SUPPORT

- If you have technical issues using Copilot or Claude, reach out to Merion IT for assistance at MerionHelpdesk@MerionResidential.com.



THANK YOU & QUESTIONS?



RESOURCES

- <https://www.ibm.com/think/topics/artificial-intelligence>
- <https://www.microsoft.com/en-us/microsoft-copilot/copilot-101/what-is-copilot>
- <https://www.ibm.com/think/topics/claude-ai>
- <https://www.purdue.edu/ai/how-to-evaluate-ai-tools/>

