IMM TECH EXTENSION 2026 · SESSION 1 · WED 2026-10-14 17:00

Practical AI at Work
Same AI, Different Results

How finance professionals raise personal productivity with AI and agents

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IMM 기획 방향 · cmdspace.work

LAST YEAR AND THIS YEAR

Last year, one demo got everyone nodding

2025
After a tool demo, everyone landed on 'so that's how to use it.'

2026
Same tools, yet results vary widely from person to person.

Today's question
Am I using it well enough not to fall behind?

A diagnosis we reached together with the organizers in a prep call

SHOW OF HANDS

One fried chicken a month, on AI?

₩0 a month
I use a free account.

About ₩30,000 a month
I pay for one subscription.

Over ₩100,000 a month
I split work across several tools.

Your speaker
spends over ₩2,000,000 a month. An investment, not a cost.

One paid subscription costs about as much as a fried chicken

Same AI, Different Productivity

Where does the gap open up?

Same model, different way of using it, different results.

강의 기획안

THREE PEOPLE

Three people using the same model

01	**The asker**	One question, one answer. Explains everything from scratch each time.
02	**The delegator**	Hands over a whole task, with the materials and the shape of the output.
03	**The standard-setter**	Passes on rules instead of fixing each result. Reviews less from then on.

The gap opens between these three stages, not between tools

WHERE AM I?

Which box are you in right now?

Box one
This week, I only asked AI questions.

Box two
I attached materials and delegated a whole task.

Box three
The second time I delegated the same task, I didn't re-explain it.

I will ask this question again at the end of the talk

Difference 1
Delegate, don't ask

Hand over work, not questions

We start with the tasks you can hand off in a finance professional's day.

세 가지 차이

QUESTION VS. BRIEF

A one-liner vs. a work brief

Question

- How's this company doing?
- Generic answers every time
- No idea what it's based on
- Start over again next time

Work brief

- 3 firms, 3 years: revenue, op. profit
- Source: DART annual reports
- 1 table + 3-line memo on outliers
- Drop any number without a source

The five boxes of a brief are on the next slide

FIVE BOXES OF A BRIEF

A work brief needs just five boxes

01
Goal
What and why. Who will read it

02
Materials
Where it comes from. Attach files and links

03
Output
Set the shape, e.g. 1 table and a 3-line memo

04
Standards
Numbers come with sources. Say so if unknown

05
Check
What you look at before approving

TASKS YOU CAN DELEGATE

Six things finance pros can delegate today

01

Filing comparison

Financials from several firms' periodic reports in one table

02

Research summary

Fund manager reports and news bundles, organized by issue

03

Email triage

Sort long threads into decided, open, and owner, then draft a reply

04

Meeting prep

Past exchanges with your next counterpart in a one-page brief

05

Excel check

Trace formula errors, change assumptions, recalculate

06

Report draft

Turn Excel numbers into memos and slides

Items 3 to 6 return later, shown inside Office

Claude for Outlook 문서 · Claude for Excel 문서 · 앱 사이 작업 문서

AN ACTUAL PUBLIC-FILINGS WORKFLOW

Start with public evidence. Keep inputs separate.

Samsung, SK hynix and LG Electronics; FY2023–2025 consolidated.

Scope
As presented in 2025 filings; KRW million

Reference
6 metrics × 3 years × 3 firms = 54 source-checked values

Separation
Sources and reference values as inputs; model outputs stored separately

AN ACTUAL PUBLIC-FILINGS WORKFLOW

Divide the assignments, not a model leaderboard.

Actual runs with different assignments—not a ranking on the same test.

Evidence
Jev selects / Gemini Flash extracts / Pro checks evidence boundaries

Analysis
Astra interprets finances / Sol proposes sensitivity assumptions

Meeting
Grok critiques / Opus drafts, then rewrites after evidence restoration

Two models agree. Is the arithmetic verified?

We checked extraction, arithmetic and evidence handoffs separately.

Extraction
54 values matched; an unsolicited industry hypothesis needed review

Arithmetic
26/27 amounts matched. KRW 3 billion error; Grok missed it

Handoff
Absent from my input ≠ absent at source. Restore evidence, then rebrief

AN ACTUAL PUBLIC-FILINGS WORKFLOW

Open the evidence in the recorded runs.

Explore actual recorded outputs and deterministic formulas—not live browser inference.

Open
Source → selection → roles → verification → briefing

Added
Recorded-run explorer + what-if calculations + two 15-slide dedicated decks

WHERE AGENTS FIT

Today is about the people who use agents

Today

How to hand your work to agents and judge the results.

Out of scope

Building the infrastructure and systems agents run on.

Difference 2
Stop re-explaining

Productivity rests on knowledge management

When AI already knows your context, you explain less.

자산 10 세컨드 브레인

THE LETDOWN

The moment AI disappoints: 'Remember yesterday?'

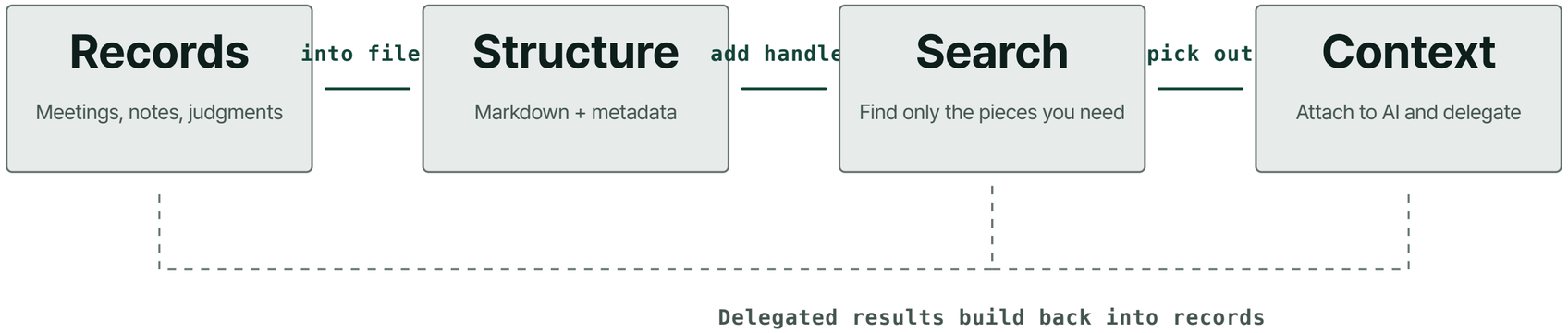
Chat window
When the chat ends, so does the context. Next day, you explain again.

App memory
Convenient, but it piles up separately in each app and is hard to move to other tools.

Files
Build your knowledge as files and you can attach it to any AI.

FROM RECORDS TO CONTEXT

Records to context: 4 steps



Format forces thinking. Structure makes search possible

PERSONAL KNOWLEDGE BASE

Six boxes of an investor's personal knowledge base

01

Manager notes

Each manager's strategy, team, and what you heard at past meetings

02

Fund notes

Commitments, investment status, key events

03

Meeting notes

Date, attendees, decisions, open items

04

Judgment log

Why you saw it that way, and whether you were right

05

Terms and standards

Your own definitions and checklists

06

Work rules

Briefs for AI and what it must not do

One subject per note, file named after the subject

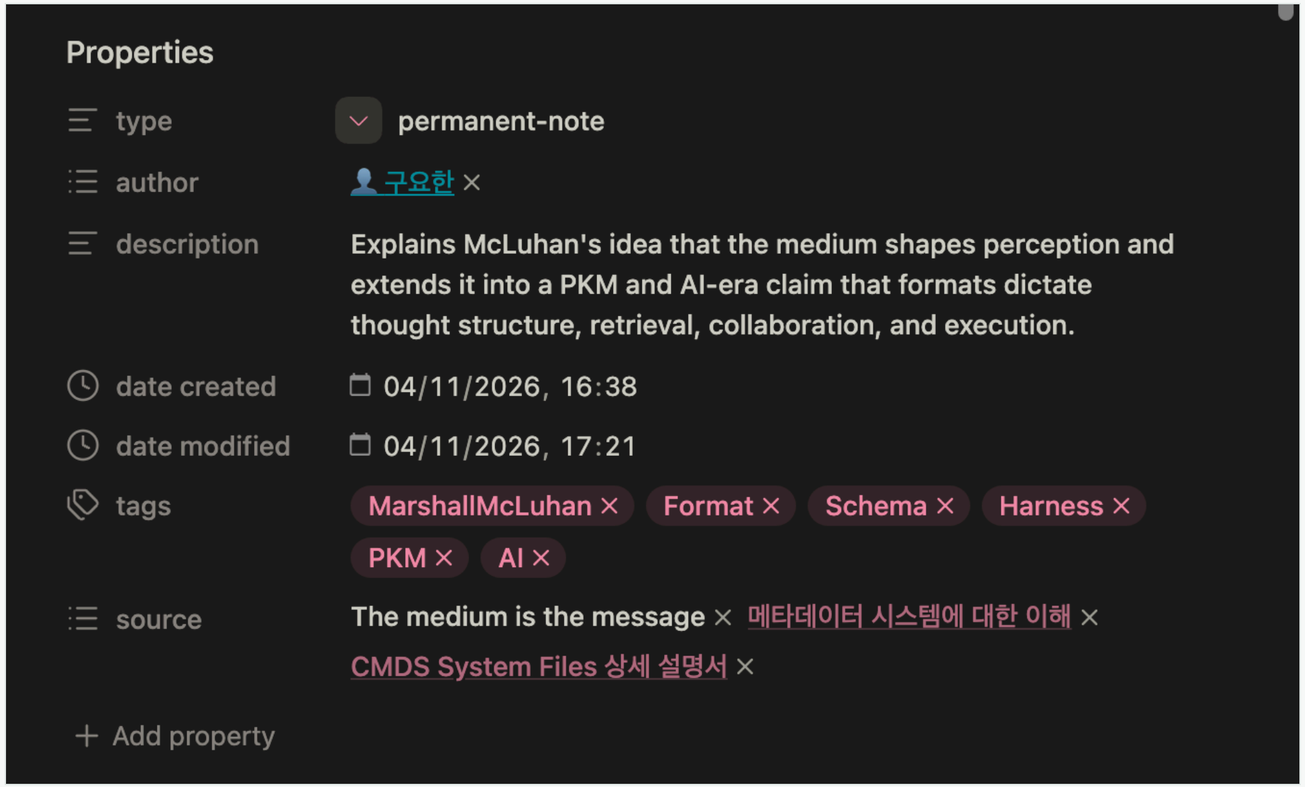
A few lines atop a note become search handles

Type: what kind of note it is

Description: one line that tells AI whether to read it

Dates and tags: when, and what it is about

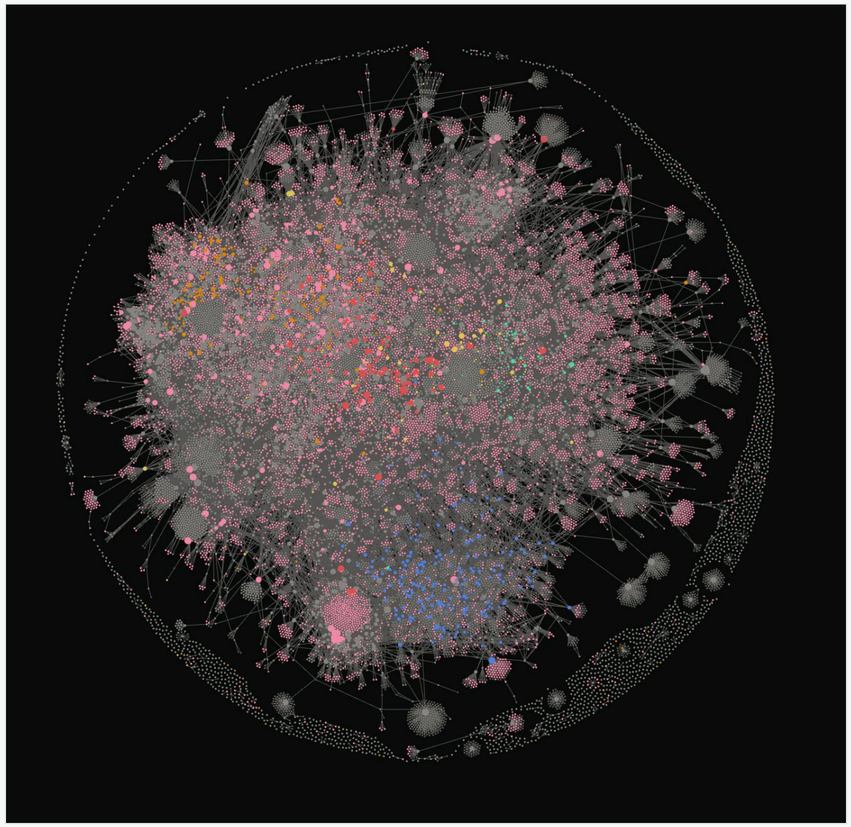
Source: where this idea came from



Obsidian is a third-party app; this screen shows real CMDSPACE note properties. Captured 2026-09-10.

These few lines let AI find the right few among 10,000 notes

Over four years of records are my AI's context



Obsidian is a third-party app; this is CMDSPACE's actual full graph. Note and tag names hidden. Captured 2026-09-10.

10,932 notes in the main vault, first entry 2022-05 (measured 10-04)

COMPANY DATA VS. MY KNOWLEDGE

First, separate company data from my knowledge

Company data

Deals, commitments, and client information go only into tools the company allows.

My knowledge

Public materials, my glossary, and my ways of working are mine to build.

Before attaching

Ask once: is this file allowed to leave?

Difference 3
Standards, not reviews

Rules for numbers and sources

Hand over the rules, not the fixes.

세 가지 차이

BOTTLENECK

Reviewing is a bottleneck. Standards are not.

Review
The faster AI gets, the more you have to read.

Standards
Write them once, and every later result follows them.

Anything you fix once becomes one line in a rules file

STANDARDS FOR NUMBERS

Four standards for financial numbers

01

Source

Tag each number with its filing or file location

02

Units and periods

State won vs. millions, consolidated vs. separate, fiscal year

03

Recalculate

Totals and ratios by formula, not by AI

04

Unknown means blank

Leave unsourced numbers blank; don't fill them in

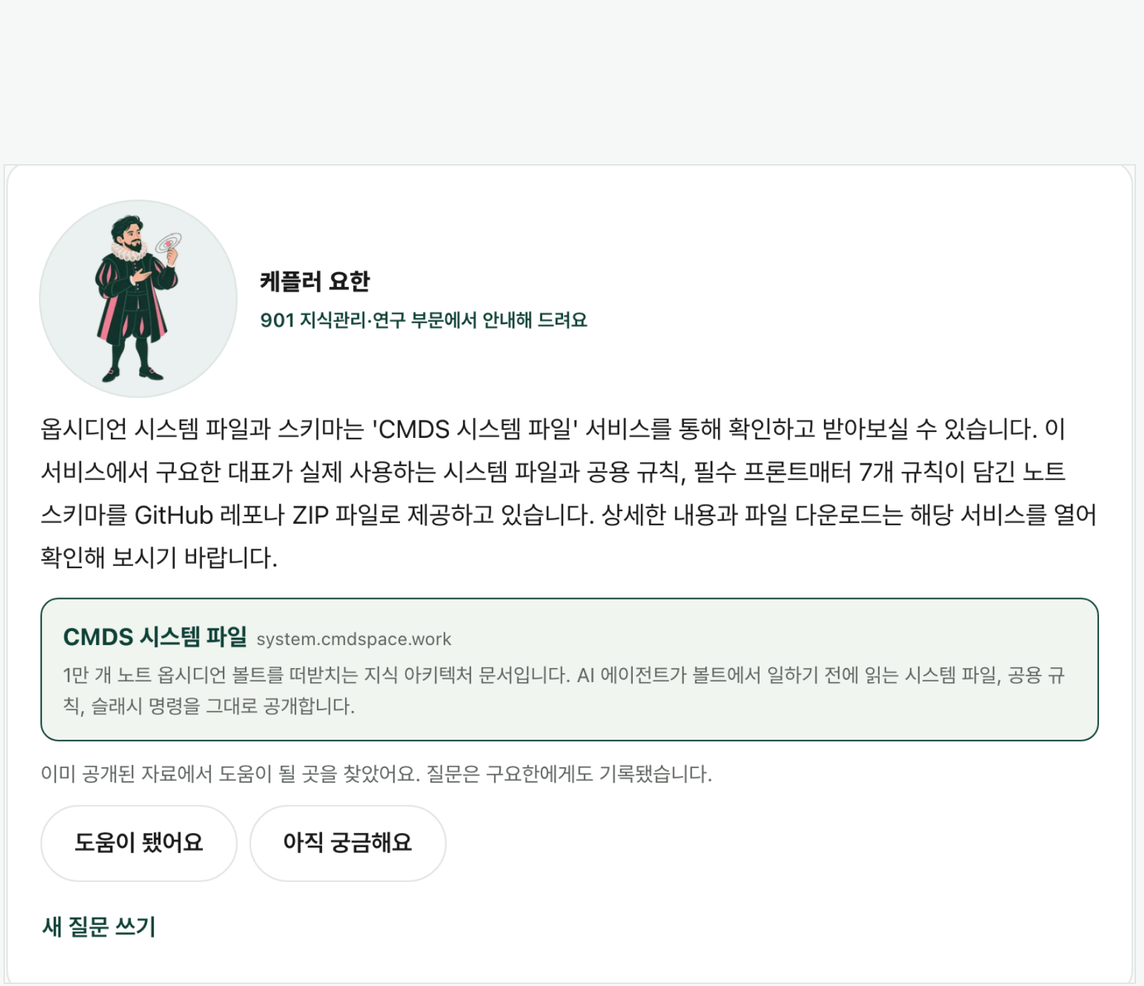
I didn't let it answer. I made it choose.

A judge model picks the matching card from published service cards

Ask twice with the options reordered; trust it only when both agree

The answering model replies only from the chosen card

If it can't pick, it hands off to a person instead of making things up



A real response to a real question, 2026-10-02 07:27 KST. Wording may differ each time.

Every question is logged, and I read each one myself

STANDARDS FILE

One page changes the output

Without standards

- A different table layout each time
- Number sources get mixed up
- Units change sentence to sentence
- My time goes into fixing

With a standards file

- Table layout stays fixed
- Every number has its source location
- Units and period stated in one line
- I only make the call

You can also put it in the Office add-in's instructions field

Into the tools you already use

Office and token costs

Rather than learning a new app, start in the Excel and Outlook you open every day.

Claude for M365

CLAUDE INSIDE OFFICE

Claude in Office, Oct 2026

APP	STATUS	IN INVESTMENT WORK
Excel	Generally available	**Cell cites, what-ifs**
PowerPoint	Generally available	**Slides from Excel data**
Word	Generally available	**Memo drafts from Excel**
Outlook	Beta	**Thread recaps, replies**
Across apps	Turn on in settings	**Context carries over**

Paid plans (Pro, Max, Team, Enterprise). Not on mobile apps

Claude for M365 · Claude for Excel 문서 · Claude for Outlook 문서 · 앱 사이 작업 문서

INVESTMENT WORK EXAMPLE

From an Excel model to memo and slides

01
Read
How was this revenue calculated? It answers by pointing to cells

02
Change
Set the discount rate to 8%. Linked cells recalculate by formula

03
Carry over
Excel numbers into a draft investment memo and slide charts

04
Check
I match memo numbers to cell locations, then approve

Step requests are adapted from examples in the official docs

ON A COMPANY ACCOUNT

What to check first at work

What you can try

- Practice with public data and your files
- Outlook drafts only; you hit send
- Beware hidden prompts in outside files
- Always review final client versions

What the company decides

- Admin deployment and usage approval
- Team/Enterprise: linking off by default
- Whether audit logs cover it
- Sensitive data controls and approvals

Add-in activity is not included in Enterprise audit logs

PRICING

Even one vendor spans 100x

VENDOR	MODEL	INPUT / OUTPUT	CACHE READ
Anthropic	Fable 5.1	10 / 50	**0.25**
Anthropic	Opus 5.5	4 / 20	**0.20**
Anthropic	Sonnet 5.5	2 / 10	**0.10**
Anthropic	Haiku 4.5	1 / 5	**0.10**
OpenAI	GPT-6 Astra	10 / 50	**1.00**
OpenAI	GPT-6.1 Sol	2 / 10	**0.10**
OpenAI	GPT-6 Luna	0.1 / 0.5	**0.01**
Google	3.8 Flash	0.75 / 3.75	**0.075**

USD per 1M tokens, synced with official pricing on 2026-10-06

FIVE HABITS

Five habits to go deep while saving tokens

01

One task, one chat

Long chats reread all earlier turns with every question

02

Match effort to the task

Low for tidying up, high for judgment and design

03

Judgment to premium models

Leave repetition and sorting to cheap models

04

Context in files

A repeated opening drops to the cache rate (API)

05

Split subscription and API

Subscription for work people do; API only for 24/7 jobs

The app's effort dial is in the model picker menu

Fireside chat

Your questions

Let's apply today's ideas to your own work.

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THREE DIFFERENCES

It's not the model.
It's the structure.

Delegate
A five-box work brief instead of a question.

Don't re-explain
Build your knowledge in files and attach it as context.

Set standards
Numbers with their sources; fixes become rules.

Back to the opening question: which box are you in now?

TONIGHT'S TO-DO

Three things to start tonight

01

Hand off one task

Delegate one recurring task this week with the five-box brief

02

One note

Put what you explain every time for that task into one file

03

Ask for sources

When numbers appear, add one line asking for their source location

WHAT I LEAVE YOU

What you can take home

01

AKM Index

AI knowledge management self-assessment · akm.cmdspace.work

02

Model guide

Prices and uses by model · models.cmdspace.work

03

System Files

Public version of my work rules for AI · system.cmdspace.work

04

LLM Wiki

An AI knowledge base built from your own materials · llm-wiki.cmdspace.work

05

Questions

Questions after the talk go here · ask.cmdspace.work

06

Book

Obsidian Professional Notes (Recommend, 2026)

All links are collected on the slides page

akm.cmdspace.work · models.cmdspace.work · system.cmdspace.work · llm-wiki.cmdspace.work

Thank you

Materials and where to send questions.

Slides

Today's deck and summary page

labs.cmdspace.work/imm-1014

Questions

Questions, anytime

ask.cmdspace.work

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Structure is what turns the same AI into different results.

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