

# AI Version Directions Based on Rubric for Existing COM 2020 Email Synthesis Assignment

## Email Synthesis Assignment: Using AI to Assist Us in Creating Effective Business Communication

Points: 60

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### Format:

- One properly formatted email (You may draft the email in Outlook and then save it as a PDF).
  - No more than **1-2 paragraphs** using a standard font and margins.
  - Save your final email as a PDF and upload it to Brightspace.
  - Save the selected data section of your **10-K report** as a PDF and upload it.
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### Task:

This assignment requires you to **summarize a complex data set** in the form of a professional email. You will use **AI as a tool** to enhance your ability to synthesize and communicate information effectively while ensuring that your final submission is **uniquely your own work** and meets professional communication standards.

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### Step 1: Retrieve a 10-K Report

- Choose a **publicly traded company** and retrieve its most recent **10-K report** from the **SEC EDGAR search tool** at [SEC.gov](https://www.sec.gov).

Step 1: Go to the SEC EDGAR Search Filings Page

- Navigate to: <https://www.sec.gov/search-filings>

Step 2: Use the “Search SEC.gov & EDGAR...” Search Box

- In the **search bar**, type either:
  - The **company's name** (e.g., *Apple Inc.*)
  - Or its **ticker symbol** (e.g., *AAPL*)
  - Press **Enter** or click the **magnifying glass/search button**.

### Step 3: Click on the Correct Company Name

- You'll see a list of possible matches. Click on the correct company name to go to its **EDGAR Company Filings page**.

### Step 4: View "Selected Filings"

- On the right side, look for "**Selected Filings.**"
- Locate "**10-K (annual reports)**" and click on the + sign to the left of that name

### Step 5: Find the Most Recent Filing

- You'll now see a list of 10-K filings sorted by date.
- Click the **Document** button (next to the most recent 10-K filing) to open the filing details.
- You may use the same company from your "**Shadow a Company**" assignment in BUS 2000, but you must create **original work** for this assignment.

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## Step 2: Analyze Key Data Sets

- Review the **10-K report** and select **at least three tables or data sets** (e.g., "**Selected Financial Data**" or "**Financial Statements and Supplementary Data**").
- Ensure that the selected data provides **clear insights** (*allows you to provide a brief summary of the company, its financial picture, and future outlook*) into the company's **financial performance and future outlook**.

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## Step 3: Use AI to Assist with Analysis

### Step 3.1: Extract Key Information

- Copy and paste relevant sections of the 10-K tables into an **AI tool** (e.g., ChatGPT, Claude, or Gemini).

- Ask AI to **summarize** key trends in each table. **Example prompt:**  
*“Summarize the key financial trends in this table, highlighting revenue growth, profitability, and any significant changes year-over-year.”*

### Step 3.2: Interpret Financial Data

- If financial terminology is unclear, ask AI for clarification. **Example prompt:**  
*“Explain what ‘operating margin’ means and how it impacts a company’s profitability. First, explain it in simple terms, then more technical terms, then give a few examples, and finally, explain it conceptually.”*
- Request AI to compare multiple tables. **Example prompt:**  
*“Compare the trends in revenue and net income from these two tables and explain any correlations.”*

### Step 3.3: Generate a Draft Summary

- Use AI to draft an **initial** summary of the three data sets in **clear business language**. **Example prompt:**  
*“Write a concise summary of the financial health of this company based on these three tables, keeping the tone professional and clear and for the average non-technical reader.”*
- Review AI’s response, **edit for accuracy**, and ensure the summary aligns with your **own analysis** of the data.
  - o Check the 10-K report and data sets to ensure that AI has correctly referenced the data and its context.
  - o **Cross-check the AI draft with your own personal summary** of the 10-K report by verbally describing the data sets for yourself. In other words, explain it out loud to yourself.
  - o Then compare your verbal description of the data sets with the AI draft summary.
    - How do the two versions match up?
    - Should you edit the AI draft to be more aligned with your own verbal description?

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## Step 4: Compose Your Email

### Step 4.1: Drafting the Email Format

- Use AI to **generate a properly formatted business email of 1 to 2 paragraphs which are easily digestible for the reader using a standard font and margins.**  
**Example prompt:** *"Create a professional email to my manager summarizing a 10-K report analysis. Include a brief summary of the company, its financial picture, and future outlook based on these summaries of the 3 tables or data sets [INSERT SUMMARIES FROM STEP 3.3 ABOVE]. Keep the email to 1-2 paragraphs that are easily digestible for the reader using a standard font and margins."*

#### Step 4.2: Structuring the Email

Ensure your email follows this structure:

**To:** [Your Manager's Name]

**Subject:** Choose a descriptive title, such as *Financial Summary of [Company Name] 10-K Report*

**Salutation:** *Dear [Manager's Name],*

**Introduction:** Clearly state the **purpose** of the email in one sentence.

**Company Summary:** 1-3 sentences **describing the company and its industry.**

**Financial Picture:** Concisely summarize **key financial highlights** from your analysis.

**Future Outlook:** Summarize **potential growth, risks, or trends** indicated in the data.

**Closing:** Offer to **provide additional details** if needed.

**Sign-Off:** *Sincerely,* or another appropriate professional closing.

**Signature Line:**

[Your Name]

[Your Title or Position, Company Name]

[Your Email]

[Your Contact Information]

#### Step 4.3: Refining the Content

- Use AI to refine and enhance **professionalism and conciseness.** **Example prompt:**  
*"Make this email more concise and professional while maintaining clarity."*
- Use AI to refine the assignment according to the rubric. To do this, save the rubric found in Brightspace as a PDF and upload it to the AI platform. Then enter a prompt such as this **Example prompt:**  
*"Refine the email as needed based on the attached grading rubric so that I should receive an A on this completed assignment according to this rubric."*

- Ensure AI-generated content is **edited and personalized** to match your voice and writing style.
  - Check for **clarity, conciseness, and accuracy** in summarizing financial data.
  - Verify that the email is **error-free**, properly formatted, and meets professional email conventions.
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### Step 5: Final Review & Submission

- Proofread your work for **accuracy, conciseness, and professionalism**.
  - Ensure the email is **logical, well-structured, and free of extraneous information**.
  - Run your email through AI grammar checkers (e.g., **Grammarly**) for **final polishing**.
  - Confirm that your email is **no longer than two paragraphs** and meets **professional concision standards**.
  - Ensure your submission **adheres to formatting guidelines** before uploading it.
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### Step 6: Saving AI Prompts

- Save the AI prompts that you used to complete this assignment.
  - We may compare and contrast your prompts with those of your classmates.
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### Purpose

This assignment helps you develop **concision in business communication**. AI serves as an **enhancement tool** to refine summarization and editing skills, but your final work should reflect **strategic decision-making** on what information to include, highlight, or omit. The goal is to **effectively distill complex financial data into a clear and professional email**.

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### Evaluation Criteria (Aligned with the Grading Rubric)

#### 1. Clarity & Organization (15 points)

- Email must **clearly communicate a central message** about the company.

- Should **omit extraneous information** and remain **logically organized**.

## 2. Professionalism (22.5 points)

- Must adhere to **professional email conventions**, including:
  - A **compelling subject line**
  - **Proper salutation and closing**
  - **Professional tone** throughout
  - **No major formatting or proofreading errors**

## 3. Concision & Brevity (22.5 points)

- The email must be **quick and effective**, within **two paragraphs**.
- The content must be **efficiently structured**, with **minimal redundancy or wordiness**.

### How to Earn an A:

- Carefully follow these directions to ensure your email **meets all professional formatting and communication standards**.
- Use AI **thoughtfully** but ensure your final work reflects **your critical thinking and personal revisions**.

Use AI responsibly to **support** your learning, not to replace your analytical skills. **Happy writing!**