

Using AI in Revenues and Benefits Services

A practical online training course for council Revenues and Benefits teams who want to use AI safely, confidently, and effectively in day-to-day work.

This course is designed to help officers save time, improve consistency, strengthen communication, and support better outcomes for residents, while retaining professional judgement, legal awareness, and accountability.

Using tools such as ChatGPT, Claude, Perplexity, Gemini, NotebookLM, and a range of other supporting applications, participants will learn how to apply AI in realistic local authority settings across Revenues and Benefits administration, policy, performance, and customer contact.

Course format

Sessions will take place every Wednesday at 10.00 am.

Each session will include:

- 60 minutes of structured teaching and demonstration
- 30 minutes of open Q and A, discussion, and live problem solving

The course is delivered online and is designed to be practical, interactive, and directly relevant to council work.

Course fees

- £450 plus VAT for one person
- £250 plus VAT for a second person from the same organisation
- £125 plus VAT for each additional person from the same organisation

Who the course is for

This programme is suitable for:

- Heads of Service
- Revenues managers
- Benefits managers
- Team leaders
- System administrators



128 CITY ROAD, LONDON, EC1V 2NX

© 2026 VISIONARY ALL RIGHTS RESERVED

Phone: 07845 6800171 malcolm@visionarynetwork.co.uk

WhatsApp: Malcolm Gardner **LinkedIn:** <https://bit.ly/3aOZGN>

Registered company: 14356542

DOC REF: USING AI IN REVENUES AND BENEFITS SERVICES.DOCX

DATE: 12/02/2025 **PAGE:** - 1 -

- Policy and performance leads
- Quality assurance officers
- Front line officers
- Contact centre and customer service staff working with Revenues and Benefits queries

Course aims

By the end of the programme, participants will be able to:

- understand what AI tools can and cannot do in a Revenues and Benefits context
- use AI to draft clearer reports, briefings, letters, and internal communications
- improve productivity without weakening accuracy, judgement, or governance
- develop prompts and workflows that support consistency and quality
- use AI to support analysis, summarisation, prioritisation, and communication
- identify risks around data protection, confidentiality, bias, and hallucination
- apply practical guardrails for safe day to day use in local authority services

Detailed syllabus

Session 1. Introduction to AI in Revenues and Benefits Services

Focus

A practical introduction to generative AI and how it can support local authority Revenues and Benefits work.

Topics covered

- what generative AI is and how it works in practice
- the difference between tools such as ChatGPT, Claude, Perplexity, Gemini, and NotebookLM
- strengths, weaknesses, and best use cases for each platform
- where AI can save time in Revenues and Benefits services
- where AI should be used with caution or not used at all
- the continuing importance of professional judgement, verification, and accountability

Practical examples

- summarising a long document into a short officer note
- turning rough notes into a polished internal briefing
- using AI to structure tasks and priorities for the day or week

Learning outcome

Participants will leave with a clear understanding of the role AI can play in council services and a realistic view of both the opportunities and the risks.

Session 2. Prompting skills for accurate and useful outputs

Focus

How to ask better questions and structure better prompts so AI gives more reliable, relevant, and usable responses.

Topics covered

- the anatomy of a strong prompt
- setting role, audience, purpose, tone, and constraints
- giving AI the right context without oversharing sensitive information
- asking for plain English outputs
- prompting for accuracy, options, comparisons, and summaries
- prompt patterns for Revenues and Benefits teams

Practical examples

- drafting a plain English explanation of a council tax issue
- asking AI to rewrite technical wording for residents
- creating a prompt template for officer briefings
- building prompts for quality checking and review

Learning outcome

Participants will be able to create structured prompts that improve quality, reduce rework, and make outputs more appropriate for professional use.

Session 3. Writing reports, briefings, and committee papers

Focus

Using AI to improve written outputs while retaining ownership, judgement, and accuracy.

Topics covered

- drafting reports from notes, bullet points, or raw material
- turning complex policy or operational information into plain English
- improving structure, logic, and readability
- adjusting tone for senior managers, members, or operational colleagues
- summarising legislation, circulars, and consultation documents
- using AI to produce first drafts more efficiently

Practical examples

- drafting a service briefing on workload pressures
- turning a long technical document into a two page summary
- producing a committee style options paper from working notes
- improving consistency of language across reports

Learning outcome

Participants will understand how to use AI as a drafting assistant to save time and improve clarity without surrendering professional control.

Session 4. Letters, emails, decision notices, and resident communications

Focus

Applying AI to everyday written communication with residents and stakeholders.

Topics covered

- drafting accurate and tone appropriate letters and emails
- improving clarity and empathy in resident communications
- maintaining consistency across standard templates
- tailoring wording for different audiences
- checking whether language is likely to confuse, inflame, or reassure
- using AI to support quality assurance before issue

Practical examples

- rewriting standard letters in clearer plain English
- producing resident friendly explanations of decisions
- drafting responses to complaints or escalations
- tailoring communications for landlords, advice agencies, and internal teams

Learning outcome

Participants will be able to use AI to improve communication quality, reduce misunderstandings, and support more consistent customer contact.

Session 5. Contact handling, call scripts, and casework support

Focus

Using AI to support front line services, contact centres, and casework teams.

Topics covered

- developing scripts for common enquiries
- creating case prompts for officers handling recurring issues
- improving first contact resolution
- generating checklists for case handling
- supporting consistent handling across teams
- using AI to suggest follow up questions or next steps

Practical examples

- producing a contact centre script for common council tax queries

- designing a call handling framework for vulnerable residents
- generating prompts for officers dealing with complex casework
- building quick reference guides for new starters

Learning outcome

Participants will learn how AI can support faster, more consistent handling of enquiries while keeping officers in control of decisions.

Session 6. Workload management, prioritisation, and quality checking

Focus

Using AI to manage workload pressures and improve team efficiency.

Topics covered

- prioritising tasks and structuring workflow
- summarising caseload issues and identifying urgent actions
- creating action lists from meetings or case notes
- using AI as a checking tool for consistency, completeness, and readability
- spotting missing information or unclear reasoning
- supporting managers with supervision and review

Practical examples

- turning an inbox of tasks into a prioritised action plan
- checking draft reports for gaps or unclear wording
- generating team reminders and process checklists
- improving note taking and follow up actions after meetings

Learning outcome

Participants will be able to use AI to support organisation, reduce duplication, and strengthen quality control.

Session 7. Data, trends, caseload insight, and performance intelligence

Focus

Using AI to help interpret data and turn information into insight.

Topics covered

- working with spreadsheets, tables, and caseload summaries
- spotting patterns, trends, and anomalies
- asking AI to explain what data may be showing
- turning analysis into narrative for managers or members
- identifying opportunities for service improvement or targeting
- using NotebookLM and other tools to organise evidence and background material

Practical examples

- summarising trends in CTR, arrears, workload, or claim changes
- converting raw data observations into a performance note
- developing questions for further investigation
- producing headline points for dashboards and service reviews

Learning outcome

Participants will understand how AI can support analytical thinking and communication of evidence, while recognising the need for validation and human interpretation.

Session 8. Campaigns, take up work, and targeted communication

Focus

Using AI to design and improve campaigns, messaging, and engagement.

Topics covered

- planning benefit take up and support campaigns
- segmenting audiences and tailoring messages
- drafting campaign wording for different channels
- creating message variants for different groups
- developing content for newsletters, websites, and social media
- improving clarity and response rates in outbound communication

Practical examples

- designing a take up campaign for pension age residents
- drafting letters and digital messages for under claiming groups
- producing campaign ideas for CTR or support scheme awareness
- creating a simple stakeholder communications plan

Learning outcome

Participants will be able to use AI to support campaign design and targeted messaging that is clearer, more efficient, and more resident focused.

Session 9. Governance, data protection, and safe use in council services

Focus

The guardrails needed for responsible and lawful use of AI in a local authority setting.

Topics covered

- what staff should and should not input into public AI tools
- confidentiality, personal data, and information security
- hallucinations, bias, and false confidence

- record keeping, audit trail, and ownership of outputs
- building internal guidance and safe use principles
- when human checking is essential
- developing practical local guardrails for teams

Practical examples

- reviewing examples of safe and unsafe prompts
- identifying red flag use cases
- drafting simple team rules for AI use
- creating a practical checklist before AI generated content is used externally

Learning outcome

Participants will gain a practical framework for using AI safely, responsibly, and defensibly within a council environment.

Session 10. Building an AI enabled team: implementation, culture, and next steps

Focus

How to embed AI into service practice in a measured and constructive way.

Topics covered

- introducing AI without overwhelming staff
- identifying high value quick wins
- supporting adoption through templates and shared prompting
- creating a small library of approved use cases
- developing internal champions and peer learning
- measuring benefits such as time saved, consistency improved, and repeat contact reduced
- planning next steps for wider rollout

Practical examples

- drafting a service level action plan for AI adoption
- identifying the first five safe and practical use cases for a team
- creating an implementation roadmap for managers
- planning how to evaluate impact after the course

Learning outcome

Participants will leave with a practical idea of how to apply the learning in their own service and how to move from experimentation to sensible operational use.

Teaching approach

This is not a theory only course. Each session is built around practical demonstration, live examples, and realistic council scenarios. Participants will see how tools can be applied to everyday work across Revenues and Benefits services.

The emphasis throughout is on:

- practical use
- plain English
- safe governance
- better productivity
- stronger consistency
- improved support for residents

Tools covered

The course will include guided use of:

- ChatGPT
- Claude
- Perplexity
- Gemini
- NotebookLM
- other relevant AI tools for drafting, summarisation, analysis, organisation, and quality checking

The mix of tools may vary slightly from session to session so that participants see the strengths of different platforms in different tasks.

What participants will take away

Participants will gain:

- a clearer understanding of AI in a council service context
- practical prompts and examples they can adapt for their own work
- greater confidence in using AI appropriately
- a better understanding of governance and risk
- ideas for improving communication, analysis, and workflow
- a practical basis for developing local AI use within their team or authority

Registration

To register send a PO + names & email addresses to info@visionarynetwork.co.uk