



**Energy Point
Consulting**

AI For the Day-to-Day Practical Tools for Division Order Analysts

Presented by Holly Frankenfield

CAPDOA Seminar

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What We'll Cover Today



01 **Why Now**
The moment we're in and why AI matters today

02 **What AI Is (and Isn't)**
Plain-language demystification including where you stay essential

03 **The Tool Landscape**
ChatGPT, Claude, Gemini, CoPilot (which one is for you)

04 **Prompting Well**
How to talk to AI so it helps

05 **AI in Your Everyday Work**
Practical use cases mapped to Division Order roles

06 **Guardrails**
What to share, what to protect, and how to stay compliant

07 **Your AI Journey**
From snacking to fully fueled, where you are and where you're headed

08 **Getting Started**
Your first action, no matter your comfort level

From Sci-Fi to Spreadsheet



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AI took 80+ years to become an overnight sensation

1940s-50s
Neural Networks &
Turing Test

1

Theoretical foundations laid. Turing asks: can a machine think?

1960s-80s
Chatbots & Expert
Systems

2

First conversational programs. Rule-based systems try to mimic expertise.

1990s-2000s
Vision &
Recommendation

3

Computer vision matures. Google, Yelp, Waze learn from your behavior.

2010s
Games & Deep
Learning

4

AI beats humans at Jeopardy, chess, and Go. Deep learning takes off.

2020s
LLMs Pass the
Turing Test

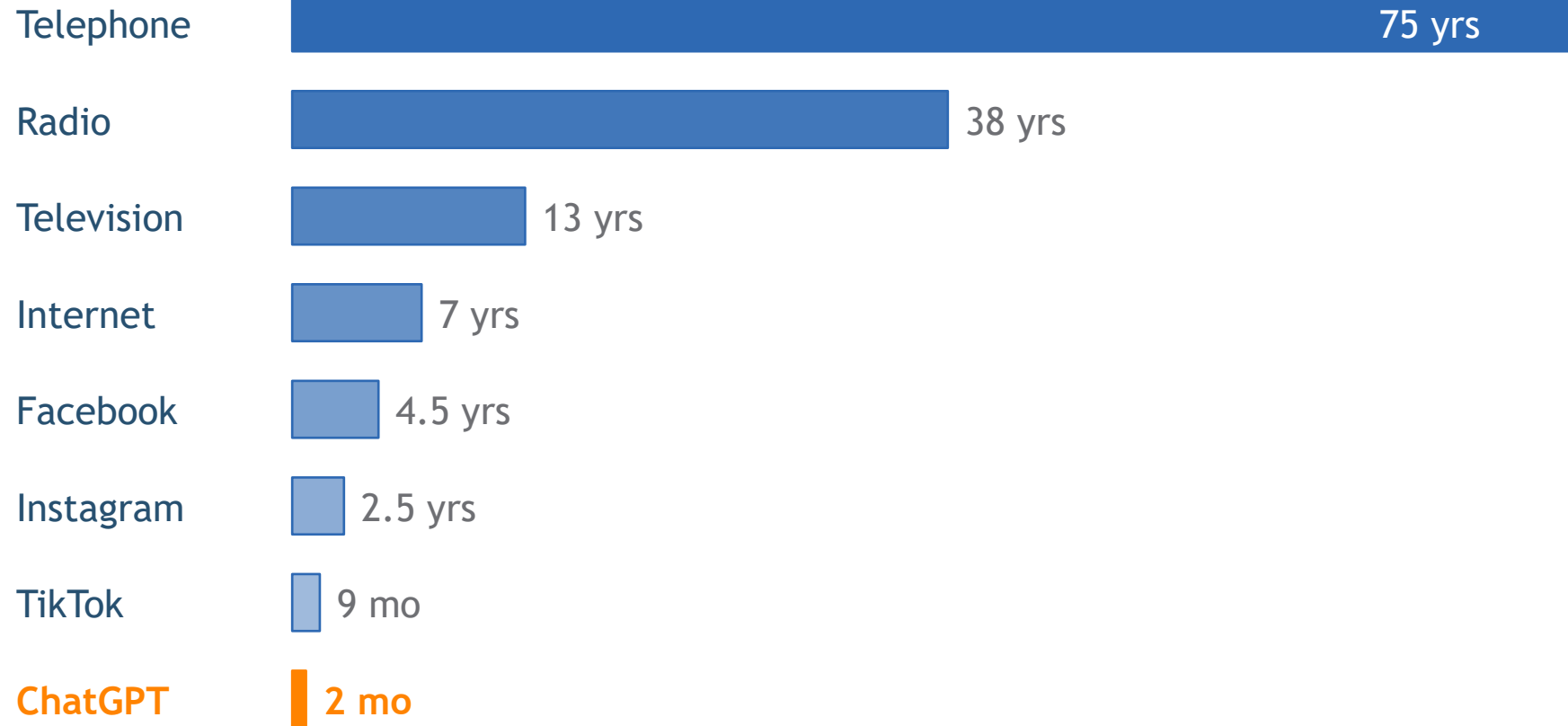
5

ChatGPT, Copilot, Claude arrive. AI goes from research to everyday work.

Why Now

AI is moving faster than any technology we've seen before.

Time to reach 100 million users →



WHAT THIS MEANS FOR YOU

- *AI is already part of daily work for 70% of employees.*
- *Your peers are learning, now is the time to start.*
- *This isn't about replacing you. It's about making you more valuable.*

Understanding the AI Landscape

These tools don't think – they predict. Knowing how they work helps you use them well.

Large Language Models (LLMs)

Trained on massive amounts of text, LLMs generate language by predicting what comes next. ChatGPT, Claude, Copilot, and Gemini are all LLMs. They don't "know" things – they pattern-match against what they've seen.

Generative AI

A broader category that includes tools that generate text, images, code, and more. LLMs fall here. What they share: they create output, they don't retrieve facts. Treat their output as a strong first draft, not a verified answer.

AI Assistants vs. AI Agents

Assistants respond to prompts one turn at a time (ChatGPT, Claude). Agents can take actions – run searches, write to files, trigger workflows. Most of what you'll use today is assistant-mode.

What This Means for DOAs

AI is a drafting and review partner, not a title expert. It doesn't have access to your systems, your title records, or your company's data – unless you put that information in the prompt.

Choosing the Right Tool

ChatGPT (OpenAI): General AI conversational assistant

Best for: Drafting owner letters, summarizing title opinions, explaining complex clauses, and building prompts you'll reuse. Enterprise version allows document uploads with stronger privacy controls.

Microsoft Copilot: Embedded in Office 365 (Word, Excel, Outlook)

Best for: Working inside your existing documents and emails. If your company already uses M365, Copilot is the lowest-friction place to start. Ask it to draft emails, summarize documents, or build Excel formulas.

Google Gemini: Integrated with Google Workspace

Best for: Teams running on Google. Summarizes Gmail threads, works inside Docs and Sheets, and can reference files in your Drive.

Claude (Anthropic): Context-rich summarizer and analyst

Best for: Reviewing long documents like title opinions, drafting nuanced correspondence, and situations where you need the AI to hold a lot of information in a single session. Strong on precision and instruction-following.

Ask your IT team which version your organization has licensed.

Meet Your New Teammate

Think of AI not as a tool, but as a capable, always-available colleague who never sleeps, never judges, and gets better the more context you give it.

MY WORK

You, and only you.

ASK YOURSELF:

- *Does it require reading the room?*
- *Could the wrong answer damage a relationship?*
- *Does it need judgment built from experience?*
- *Is someone's trust or career on the line?*

EXAMPLES:

- *Leading a sensitive stakeholder conversation*
- *Making the final recommendation to a client*
- *Deciding what the right answer actually is*
- *Building genuine trust and rapport*

AI stays out of these. This is irreplaceable human work.

"WITH ME" WORK

You lead. AI accelerates.

ASK YOURSELF:

- *Would a first draft save you significant time?*
- *Could AI organize or structure your thinking?*
- *Do you need to analyze a large amount of content?*
- *Is this work you'd review carefully before using?*

EXAMPLES:

- *Drafting communications and presentations*
- *Stakeholder analysis and impact assessments*
- *Building change and communication plans*
- *Research synthesis and readiness reporting*

You drive. AI makes the first pass faster and better.

"FOR ME" WORK

AI runs it. You review.

ASK YOURSELF:

- *Is this mostly formatting or organizing existing content?*
- *Would the output be easy to verify quickly?*
- *Is this a repeatable task you do often?*
- *Does it require minimal judgment to complete?*

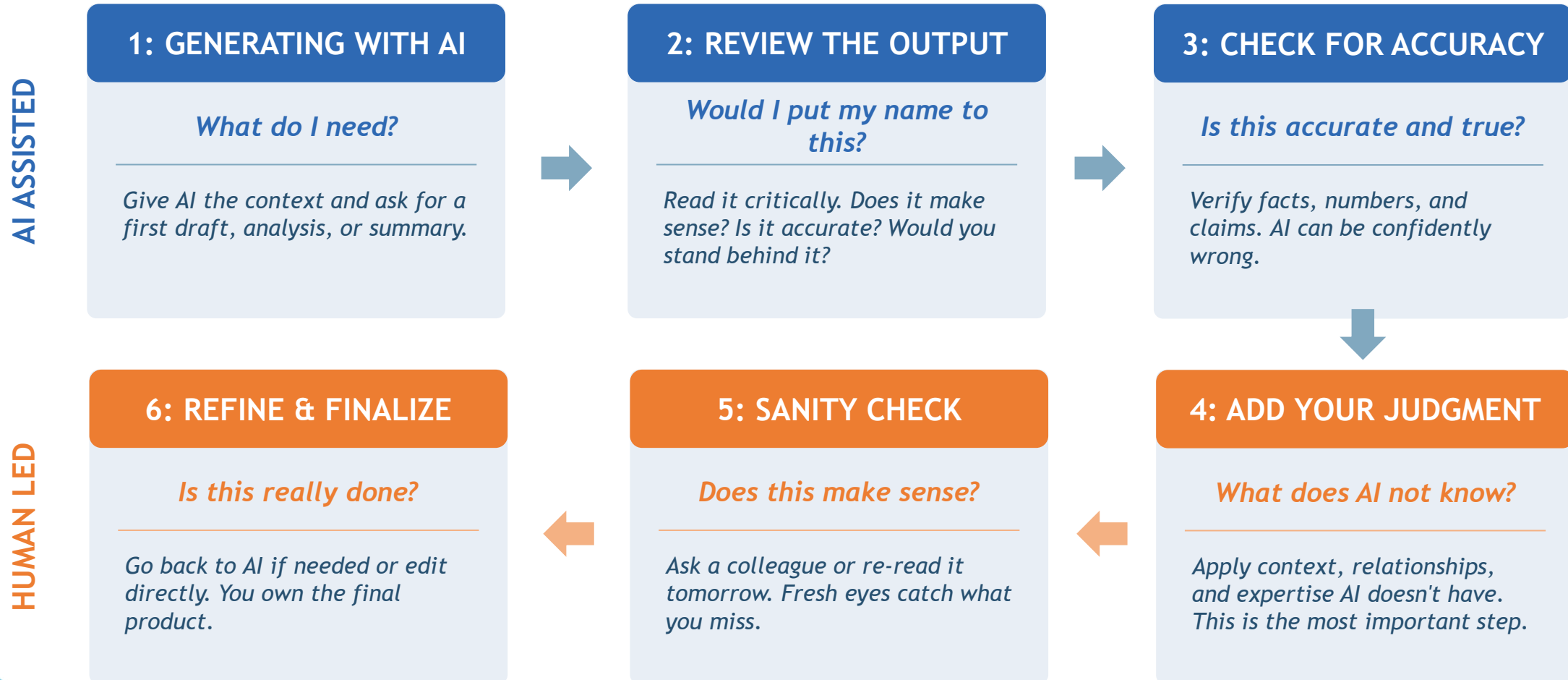
EXAMPLES:

- *Meeting summaries from transcripts*
- *Document formatting and cleanup*
- *First-draft template population*
- *Survey response analysis and data organizing*

Mostly automated. Always check before you send.

From AI Output to Real Work

Getting something back from AI is step one, but the real value add is turning that output into something you can use.



Prompting Well: How to Talk to AI

The quality of your output depends almost entirely on the quality of your input. Better prompts = better results.

GOAL	CONTEXT	SOURCE	EXPECTATIONS
<i>What do you want?</i>	<i>Why, and who's involved?</i>	<i>What should AI draw from?</i>	<i>How should it respond?</i>
<i>"Draft a one-page project update for the leadership team."</i>	<i>"You are the PM, & the project is in week 4 of a system implementation. The team has requested an update."</i>	<i>"Use the meeting notes and status tracker attached to this project."</i>	<i>"Use bullet points. Keep it under one page. Tone should be professional and reassuring."</i>

✗ "Draft a project plan."



✓ "Write a project plan for the land system implementation affecting 3 teams in the Land organization. I'm preparing for the project kickoff. Use the attached scope and timeline doc. Format as a table with actions, owners, and timing."

✗ "Summarize this meeting."



✓ "Summarize this transcript from our discovery session with the project team. Identify the top 3 concerns raised, any decisions made, and next steps. Write it as a briefing I can share with the project sponsor."

✗ "Help me with this email."



✓ "Rewrite this draft email to my VP of Land. She's skeptical about the timeline. Keep it under 150 words, acknowledge her concern, and end with a clear ask for a 30-minute call this week."

Division Order Use Cases

Owner Communication Drafting

Analysts spend significant time writing similar emails and letters.

AI Used to draft responses to:

- Royalty payment questions
- Address changes
- Ownership inquiries
- Suspense explanations
- Division order follow-ups
- Check detail requests

Title Opinion Summarization

Reviewing lengthy title opinions is time-consuming.

AI Used to summarize:

- Ownership recommendations
- Curative requirements
- Probate requirements
- Lease burdens
- NRI calculations
- Exceptions

New Well Setup Review

Comparing title opinions to the ownership deck is tedious.

AI used to compare:

- Names
- Decimal interests
- Tract ownership
- Lease burdens
- Working interests

Ownership Transfer Analysis

Analyzing deeds and conveyances can take significant time.

AI used to review:

- Deeds
- Assignments
- Mineral conveyances
- Trust documents
- Probate documents

Suspense Analysis

Large suspense populations require investigation.

AI Used to categorize:

- Deceased owners
- Missing addresses
- Tax issues
- Returned mail
- Ownership disputes

Division Order Use Cases

Owner Relations Support

Analysts often answer the same questions repeatedly.

AI Used to create:

- *FAQ documents*
- *Knowledge articles*
- *Call scripts*
- *Email templates*

Lease Burden Review

Complex burden calculations are difficult to explain.

AI Used to explain:

- *NPRIs*
- *ORRIs*
- *Lease burdens*
- *Pooling impacts*

Division Order Form Creation

Forms and templates are manually created and maintained.

AI Used to generate:

- *Division orders*
- *Ownership transfer forms*
- *Affidavits*
- *Check reissue requests*
- *Address change forms*

Audit and Exception Reporting

Analysts spend hours reviewing large datasets.

AI Used to identify:

- *Duplicate owners*
- *Decimal variances*
- *Missing tax IDs*
- *Invalid addresses*
- *Ownership gaps*

Meeting Notes and Action Items

Analysts attend numerous setup and ownership meetings.

AI Used to summarize:

- *Decisions*
- *Action items*
- *Risks*
- *Outstanding questions*

What to Watch Out For

AI can be confidently wrong.

LLMs generate plausible-sounding text. They don't verify facts against your systems, and they don't know your title records. A letter that reads perfectly can still contain a wrong decimal, a wrong owner name, or a fabricated legal description. Every output needs your review before it goes anywhere.

Confidentiality is your responsibility.

Free and personal AI accounts (ChatGPT free tier, personal Copilot) may use your inputs to train future models. Do not enter owner PII, confidential title data, or proprietary well information into these accounts. Use your company's licensed enterprise version or ask IT what is approved.

AI doesn't know your company's process.

AI gives you a reasonable industry answer, not your organization's answer. It doesn't know your specific DOI setup, your approval workflow, or your company's interpretation of a given title question. Use it to generate a starting point, then apply your judgment.

Prompting takes practice, that's normal.

Your first prompt won't always produce what you need. That's not a failure — it's the process. Refine the prompt. Add specifics. Tell it what was wrong. The analysts who get the most out of AI are the ones who treat it like a conversation, not a search bar.

Guardrails: Prompting Safely

AI is powerful. Part of using it well is knowing what not to put in a prompt.

✓ SAFE TO USE

- *Project summaries and scope descriptions*
- *Internal process documents and templates*
- *Your own meeting notes and drafts*
- *Publicly available information about a client or industry*
- *Anonymized or aggregated data for analysis*

✗ KEEP OUT

- *Owner names, contract details, or proprietary data without explicit permission*
- *Employee performance issues, HR concerns, or identifiable personal information*
- *Confidential financial data or unreleased deal information*
- *Passwords, access credentials, or security information*
- *Anything you wouldn't be comfortable with seeing*

When in doubt, abstract it or anonymize it. If you're unsure whether something is safe to share, ask your leadership before using it in a prompt.

Questions to Ask Your Leadership

Before you go further with AI in your organization, make sure these questions have answers.

GUIDANCE

- *Which AI tools has IT approved for use with company data?*
- *Are there use cases that are off-limits right now?*
- *Is there a company policy on AI-generated content in external documents?*
- *Who is the internal point of contact for AI questions?*

GOVERNANCE

- *How should AI-assisted work be documented or disclosed?*
- *What data classification applies to what we put into AI tools?*
- *Who reviews AI output before it reaches owners or external parties?*
- *Is there an audit trail requirement for AI-assisted decisions?*

WHERE TO GROW

- *Is the company evaluating AI tools purpose-built for land or title work?*
- *Are there training resources available for our team?*
- *What would a pilot look like – and who sponsors it?*
- *How do we share what's working across the land department?*

Your AI Journey



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Everyone using AI right now is somewhere on this curve, whether they realize it or not.

01 AI Snacking

Getting started

- Quick wins, one-off tasks
- Rewriting and summarizing
- No structure or consistency
- Outputs are helpful... but generic

Helpful. Not yet transformative.

Curiosity

02 AI Assisted

Working smarter

- Reusable prompts and templates
- Project documents as context
- Regular use across your workflow
- Tailored, relevant outputs

More efficient. Consistently better.

Experimentation

03 Fueled by AI

Changing how you work

- AI embedded in daily practice
- Transcripts, scanning, tracking automated
- Continuous impact analysis
- Focus shifts from capturing to influencing

Less time on admin. More time on what requires you.

Capability

What This Frees You Up to Do

The goal isn't to do the same work faster. It's to make room for the work that only you can do.

Before: Capturing, writing down what happened



With AI: Being fully present in the room while it's happening

Before: Drafting from scratch, building plans and documents by hand



With AI: Designing the thinking, then refining what AI produces

Before: Tracking down information and context



With AI: Having it ready and synthesized before the conversation starts

Before: Generic deliverables that take hours to build



With AI: Tailored outputs that feel like they were built specifically for that client

Before: Reacting to what just happened



With AI: Anticipating what's coming and showing up prepared

Your Personal Action Plan

Start small. Pick one task you do repeatedly and test AI on it this week.

Pick your first task.

1

Choose something low-stakes and repetitive: an owner notification letter, a summary of a long document, or a checklist you rebuild every new well. This is your test case.

Choose the right tool for your environment.

2

If your company has M365, start with Copilot – it's already in your inbox and your documents. If not, check with IT about what's approved. Don't use a personal account for anything confidential.

Use the three-part prompt structure.

3

Set the role. Be specific. Review and refine. Run the same task two or three times with different prompts and notice what changes. This is how you build your personal prompt library.

Share what works.

4

When you find a prompt that reliably produces good output, write it down and share it with your team. The most valuable AI skill in a land department isn't knowing the tool – it's building the library of prompts that work for your specific work.



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Holly Frankenfield

Chief Transformation Officer | Energy Point Consulting

With 25 years of experience leading transformation and data initiatives in oil and gas, Holly bridges the gap between people, process, and technology. She has led ERP implementations, process redesign, data governance programs, and post-acquisition integrations across both small and large operators. She is passionate about helping people work smarter — with the right tools, applied with confidence.

hollyfrankenfield@energypointllc.com | [linkedin.com/in/holly-frankenfield-34806011](https://www.linkedin.com/in/holly-frankenfield-34806011)