

Task Cards

Five real workflows for using Madison AI as your everyday assistant. Setup, plays, and confidence checks for the work your team already has to get done.

INSIDE

1. Legislative history memo
2. Approval process letter for a resident or developer
3. Council presentation prep
4. Site plan compliance review
5. Newsletter or recap from a meeting transcript

You are the director.

When you have an AI assistant, you are not the doer. You are the director. Directing is a different muscle than doing, and it is the whole game.

Each of the five cards that follow walks through a real work task, end to end. We built them from the workflows we run with cities and counties every day, and from the live examples in our AI in Action sessions. The structure is the same on every card so you can find what you need fast.

Setup tells you what model and agents you need turned on. The Play is the step by step. Confidence Checks are how you know the work is right. Watch-Outs are the traps we see people fall into. And Adapt It For gives you three or four other tasks the same play works on.

Ask what data Madison has first

Date ranges, most recent transcript, most recent code update. Do not assume.

Ask Madison to ask you questions

"Ask me what you need to know before you answer." A much better first draft.

Use agents when accuracy matters

Freeform is fine when exploring. Pre-built agents are best when you need to be right.

Step it, do not stack it

One task at a time. "Do all seven" is how you get a muddled answer.

Verify the citation, not just the answer

If it cites a packet when it should cite code, push back.

Use it as a thinking partner

"What have I not thought about?" is a prompt worth memorizing.

Legislative History Memo

FOR

*Assistant City / County Managers,
management analysts, executive staff*

OUTPUT

*A cited legislative history memo, exportable
to Word or a PowerPoint outline*

SETUP

Agency-wide model

Deep Research toggled on

Legislative History agent (if available)

THE PLAY

1. Ask what date range of data Madison has for the topic.
2. Ask for the full history. Turn on Deep Research or use the agent.
3. Read through the response and check the citations.
4. Ask: "How confident are you in this answer? What are the data gaps?"
5. Fill the gaps by asking follow-up questions or noting them in the memo.
6. Export to Word for polish, or copy and paste into your email or memo template.

CONFIDENCE CHECKS

- Citations resolve to your actual ordinances, resolutions, and minutes.
- Response cites primary sources, not just secondary summaries.
- Timeline is complete, or gaps are explicitly flagged.

WATCH-OUTS

- The email button strips HTML tables. If your memo has a table, copy and paste instead.
- The PowerPoint export is a first draft, not a finished deck. Ask for an outline first, then push to slides.

ADAPT IT FOR *Project history · Litigation background · Policy evolution · Capital project timelines*

Approval Process Letter

FOR

Planners, community development staff

OUTPUT

A cited plain-language letter explaining a code or approval process

SETUP

Planning & Zoning model

Code Lookup agent

THE PLAY

1. Ask Madison to ask you questions first: "Ask me what you need to know before you answer."
2. Answer the follow-ups. Zoning district, property type, project scope, whatever it needs.
3. Use the Code Lookup agent, or freeform with "only look at code" in the prompt.
4. Verify the citations resolve to the code, not to packets or minutes.
5. Continue in the same chat: "Draft a letter to [role] explaining this process. Include the code citations."
6. Copy and paste into your jurisdiction's letter template.

CONFIDENCE CHECKS

- Citations point to code sections, not just meeting materials.
- Zoning district and property type were confirmed before the answer was generated.
- Letter matches your jurisdiction's formal letter format.

WATCH-OUTS

- If Madison references a council packet when you need code, push back. Ask it to revise using only code.
- If code has been amended recently, ask: "Check meeting minutes for anything passed but not yet codified."

ADAPT IT FOR *Setback questions · Permit requirements · Use classifications · Variance explanations*

Council Presentation Prep

FOR

Executives, management analysts, project leads

OUTPUT

A briefing packet with vote history, expected questions, and a prep checklist

SETUP

Agency-wide model

Anticipated Questions agent

THE PLAY

1. Ask for common council topics over the past year.
2. Ask where council is aligned and where they are divided on your topic.
3. Prompt: "I have a presentation on [topic] coming up. Give me the vote history, likely questions, and a prep checklist."
4. Run the Anticipated Questions agent for per-elected question predictions.
5. Use Madison as a thinking partner: "What have I not thought about?"
6. Work through the prep checklist one item at a time. Copy and paste the specific item into your next prompt so Madison knows exactly which one you mean.

CONFIDENCE CHECKS

- Vote history matches the record.
- Division points are cited to specific meetings or transcripts.
- Anticipated questions align with the electeds you know.

WATCH-OUTS

- Do not stack seven checklist items into one prompt. Take them one at a time.
- If Madison confuses which "number one" you meant, paste the exact text of the item you want.

ADAPT IT FOR *Board retreat prep · Controversial vote prep · Project updates · Community meeting prep*

Site Plan Compliance Review

FOR

Planners

OUTPUT

A cited compliance summary, checklist of outstanding items, and draft letter to the developer

SETUP

Planning & Zoning model

Review Site Plans agent

Esri / GIS integration

THE PLAY

1. Upload the site plan. Drag it onto the chat or select it from your library.
2. Run the Review Site Plans agent.
3. While it runs, pull up the GIS map to orient yourself on the parcel and its surroundings.
4. Cross-check Madison's extracted content against the original drawing.
5. Ask: "Give me a short list of outstanding items and non-compliant elements only."
6. Ask: "Draft a letter to the developer with that checklist and the code citations."
7. Verify code citations are current.

CONFIDENCE CHECKS

- Text-based measurements on the plan (setbacks, dimensions, tree counts) match the drawing.
- Any discrepancy between drawing and text is flagged.
- Code cited is the most recent version.

WATCH-OUTS

- Madison reads text on the plan, not geospatial measurements. Always cross-check the drawing.
- Ask: "Is there anything in recent meeting minutes that has passed but not been codified yet?" This catches amendments that are approved but not yet in the indexed code.

ADAPT IT FOR *Building permit review · Subdivision review · Variance analysis · Development agreement compliance*

Newsletter from a Transcript

FOR

PIOs, communications staff, executive teams

OUTPUT

A newsletter, staff recap, action item list, or community update

SETUP

Agency-wide model

Newsletter agent

Transcript Summary agent

THE PLAY

1. Ask: "What is the most recent transcript you have?"
2. Confirm the transcript matches the meeting you want to cover.
3. Run the Newsletter agent using that transcript.
4. Review for tone, accuracy, and the items you want to feature.
5. Ask for revisions or a specific angle if the first draft is not right.
6. Export to Word for final polish, or copy and paste into your email tool.

CONFIDENCE CHECKS

- The transcript covers the meeting you meant.
- Names and titles match your official style. Transcripts labeled with "MD" have been cleaned by Madison.
- Key decisions and votes are represented accurately.

WATCH-OUTS

- If a transcript has not been ingested yet, the agent cannot use it. Ask before you start.
- Transcript cleanup standardizes names and acronyms. Content is never changed.

ADAPT IT FOR *Action item lists · Staff summaries · Community update posts · Talking points · Department briefings*

KEEP GOING

Bring us your next task.

These five cards started as live walkthroughs in our AI in Action sessions with the executives, planners, PIOs, and analysts who use Madison every day. If you have a workflow that worked, or one you are stuck on, we would love to feature it next.

Reach out to your account manager, or drop into an upcoming session:

- ERP data, with our new partner ThirdLine
- Your model, your data, on other surfaces (MCP)

Erica Olsen

Founder & CEO, Madison AI