



FROM PREP TO FOLLOW UP

Smarter Meetings with AI

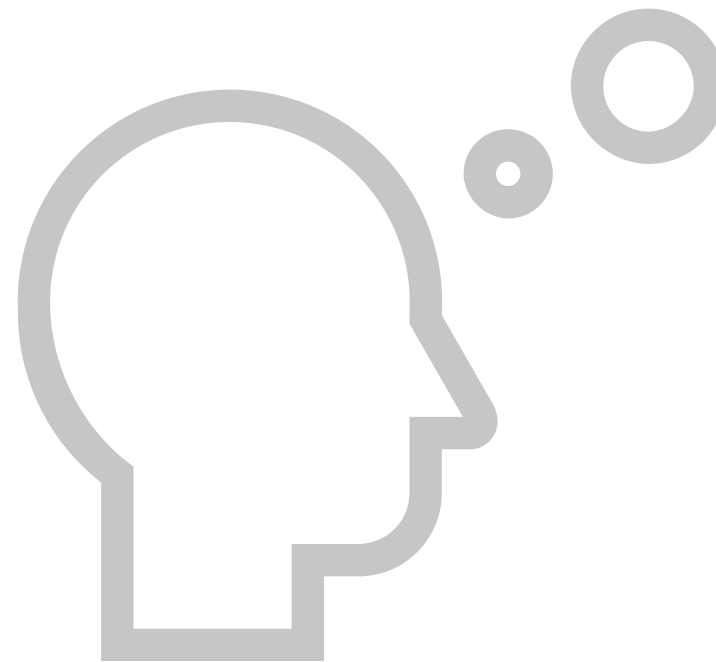
JANUARY 29, 2026 | 12 - 1:30 PM | COLLABORATION ZONE

- Grab Lunch, Get Settled
- Ready, Set, Go!
- Clear Plates, Open Laptops
- Try It Together
- Let's Talk Use Cases
- Closing and Next Steps



Mentimeter Icebreaker

On average, how
much time per week
do you estimate AI is
saving you in your
work?



How did we get here?

AI Opportunity Accelerator South Carolina Cohort

● ○ ○ ○ ○ ○
Grab Lunch, Get Settled



Discovery Day (April 10, 2025) team reflected on

- what tasks...
 - ...take a lot of time
 - ...involve repetitive work
 - ...experience bottlenecks or backlogs
 - ...contribute to staff frustration
- ... in four domains
 - Operational efficiency and automation
 - Evaluation and data analysis
 - Grant writing and fundraising
 - Community engagement and outreach

To identify a pain point as our focus → *meeting lifecycle*

Google.org

**PROJECT
EVIDENT**

Logos from [here](#) and [here](#)

How did we get here?

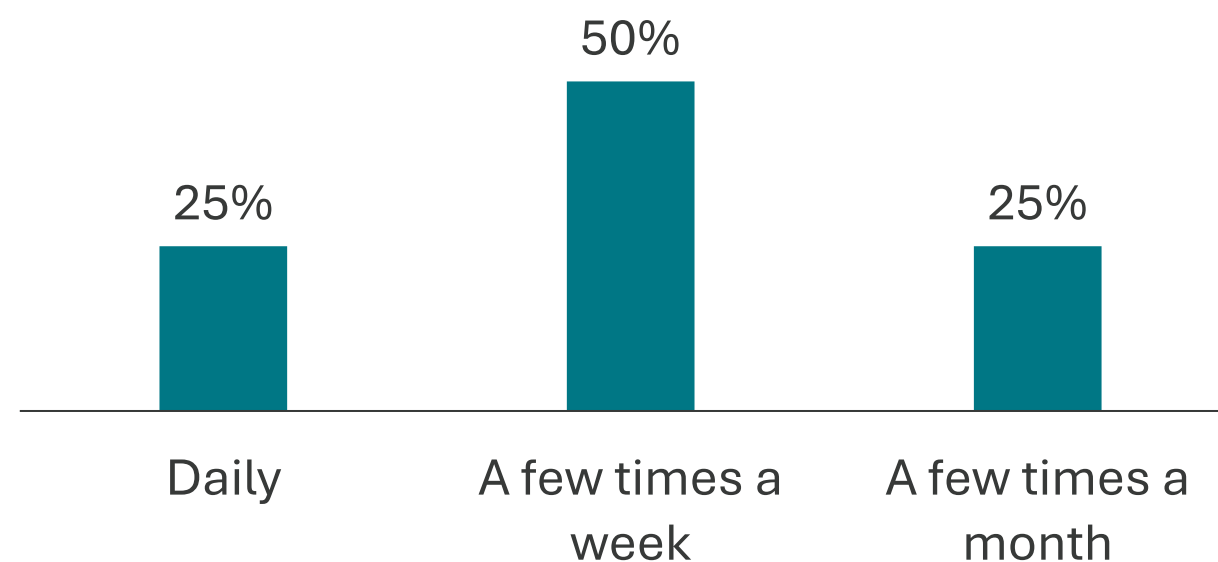
Results from July 2025 Foundation Staff Survey



92%

of staff have used AI tools for their work at the Foundation in the last 6 months

Staff use AI for work often



Top tools used

1. ChatGPT (75%)
2. Grammarly (33%)
3. Google Gemini (17%)
4. Claude (17%)

**“Our Approach to AI”
Guiding Document**

**ChatGPT Business
Subscription Purchased**

**September 2025
Lunch & Launch Training**

Note: Charged each month
based on active users



Microsoft Copilot

Another AI tool available to you

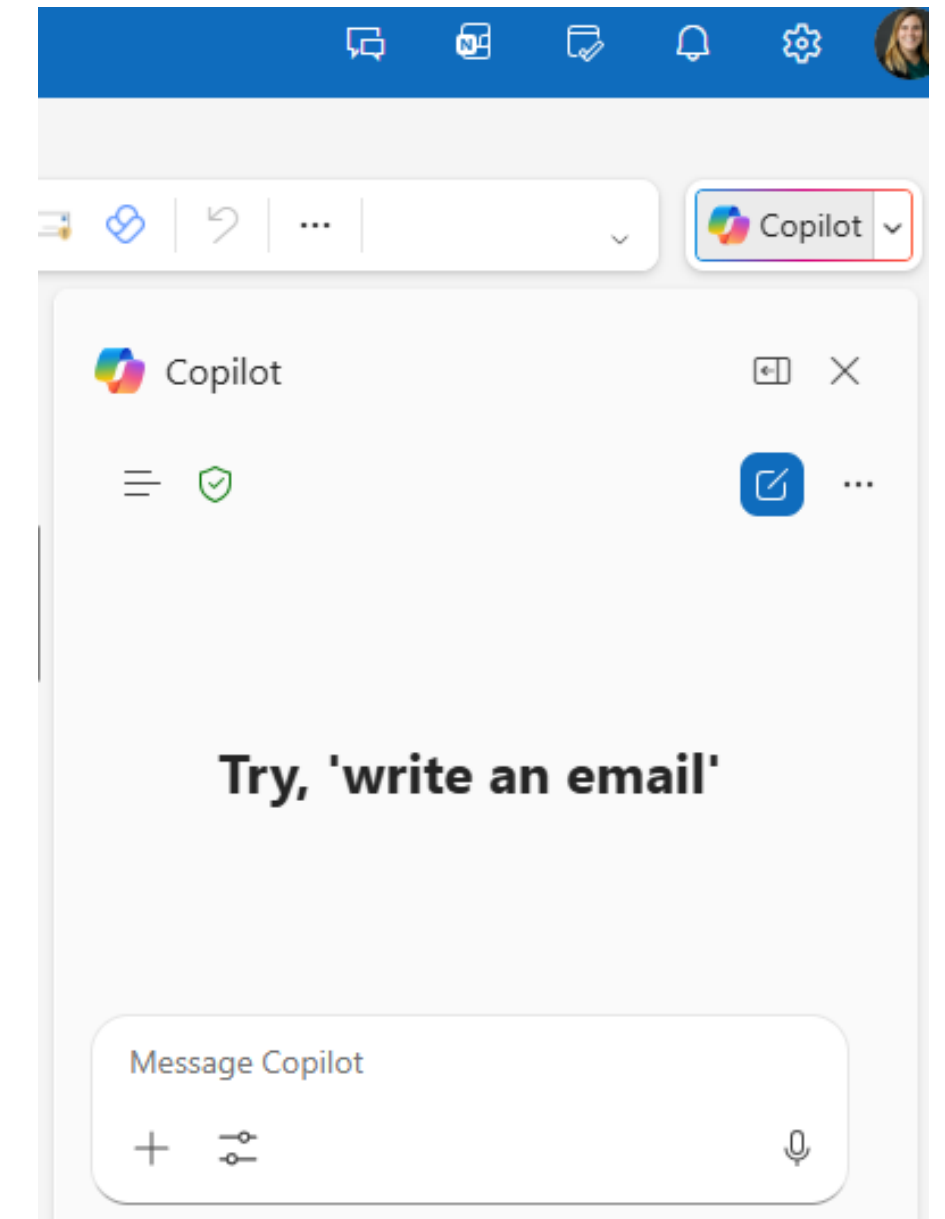
As a Microsoft organization, all staff currently have access to the **free** version of Copilot

- Standalone chat app
- Built into Microsoft 365 apps interface, like Outlook

While this is protected in our Microsoft environment, it is limited and recommended to **only use for general, non-sensitive tasks**.



Grab Lunch, Get Settled



Microsoft Copilot

Another AI tool available to you



Grab Lunch, Get Settled

Free Copilot can...	Free Copilot cannot...
• Analyze or summarize content you manually provide • Generate images (with limits) • Provide general-purpose chat and rewriting • Operate in a secure, web-based chat environment	• Access or search across your emails or files • Integrate into other M365 apps • Use your organization's data (e.g., calendars) • Automate workflows inside Mi65 apps • Provide high or unlimited usage of advanced models

FYI – Chelsea currently testing the paid version of Copilot



Remember: SPARK

Five Uses for AI at Work



Grab Lunch, Get Settled



Summarize

Condense or clarify information for different audiences

“ Summarize this 3-page report in 5 bullet points ”



Plan

Organize ideas, outline steps, or create checklists

“ How can I use Excel Power Query to turn my data from wide to long ”



Adapt

Reshape content for different uses or examine information critically

“ Rewrite this update for a new Board member ”



Refine

Polish, edit, or improve content you have drafted

“ Make this email more concise and professional ”



Kickstart

Generate fresh ideas or creative options from scratch

“ Brainstorm 10 creative themes for a fundraising event ”



Remember: Prompting like a Pro



Help me with [task].

What you want to accomplish

You're a [persona].

Which expertise to draw from

The output should be [format].

How the results should appear

You should know that [context].

Needed background information

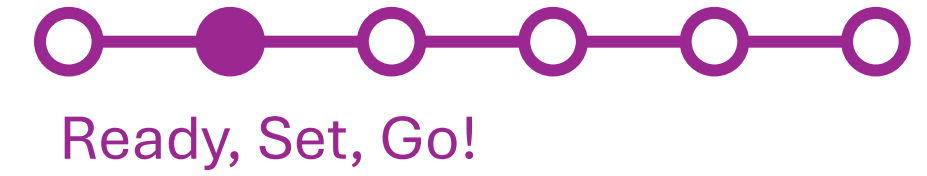
Here are some [references].

Examples

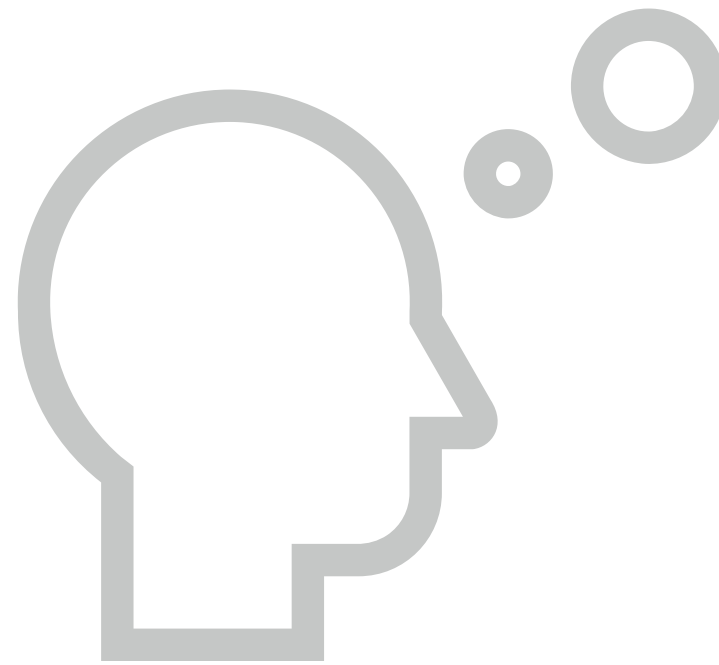
**Critically evaluate the output
Iterate to make it great**



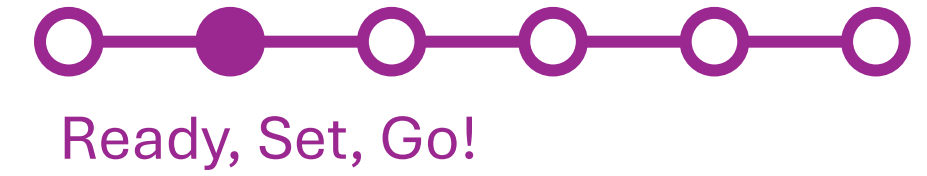
Have you ever thought...



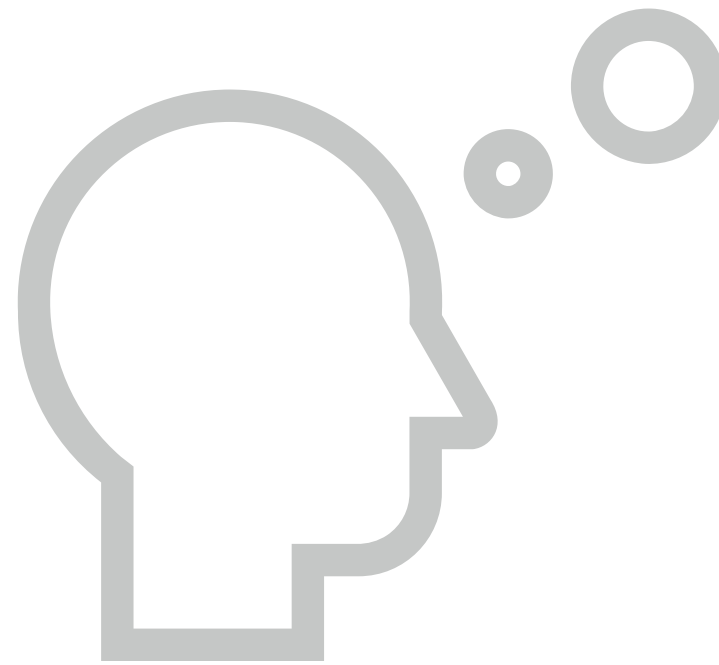
Facilitating a good meeting is hard and takes so much time to prep and follow-up



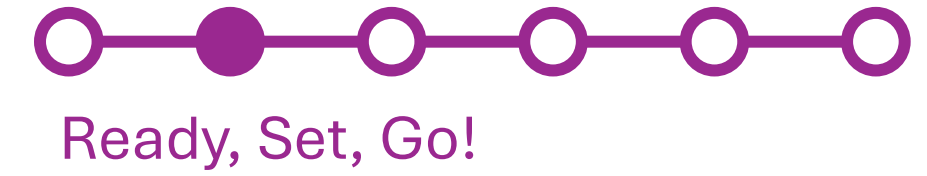
Have you ever thought...



How am I supposed
to do my job when I
am in meetings all
the time?



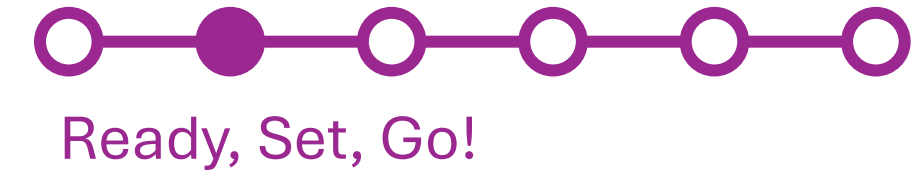
Have you ever thought...



What are we talking
about?



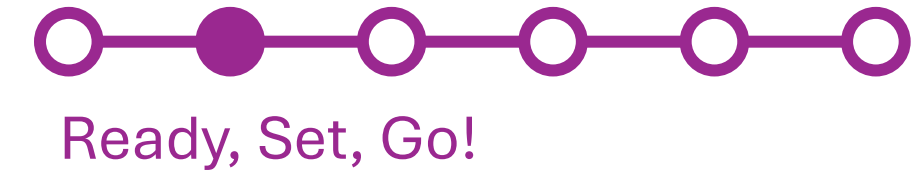
Have you ever thought...



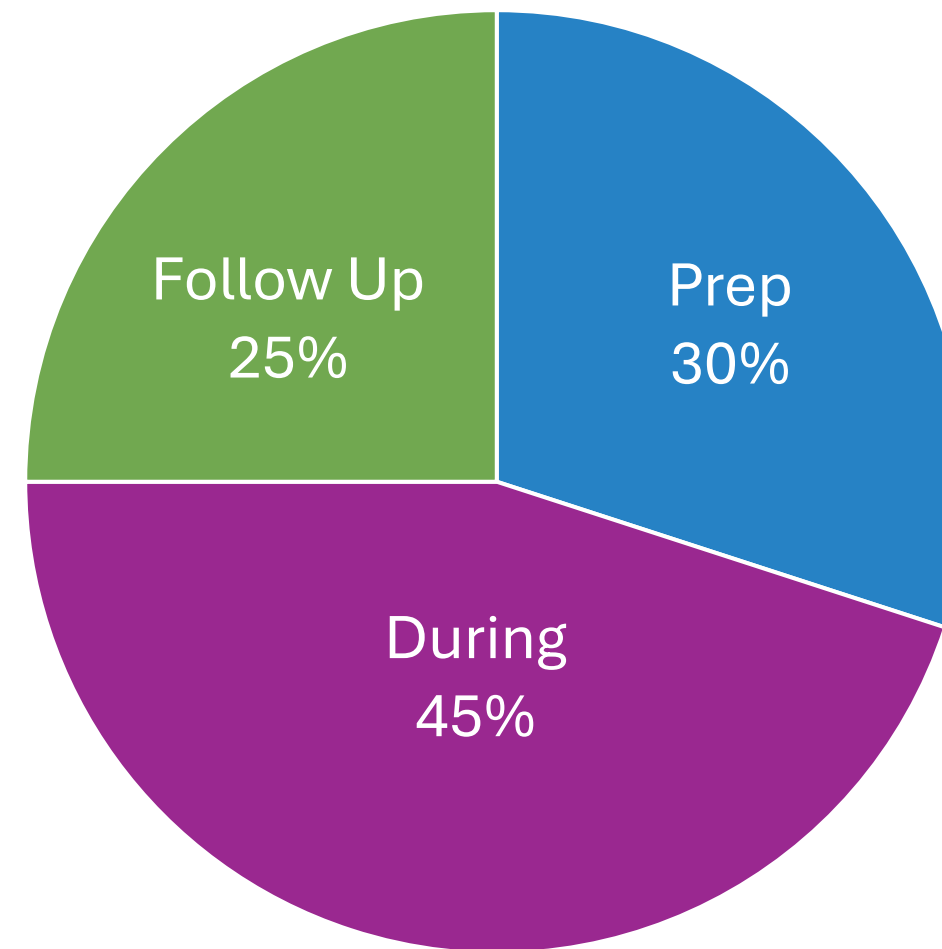
Why am I here?



Ideal Meeting Effort Balance



Summary, action items,
progress, resolution

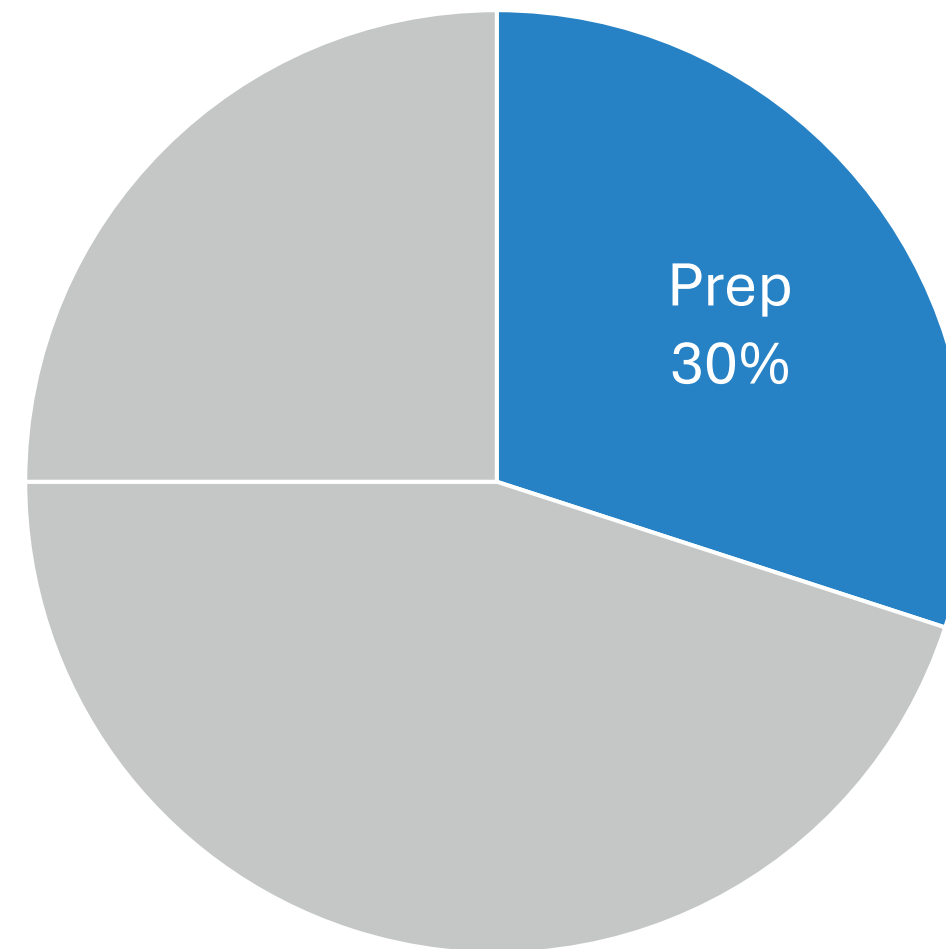
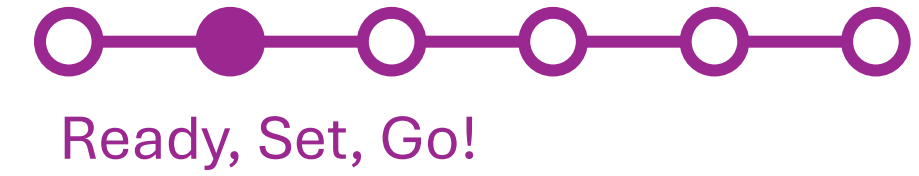


Scheduling, purpose, agenda,
role clarity, pre-work

Discussion, decisions,
alignment, next steps



Ideal Meeting Effort Balance

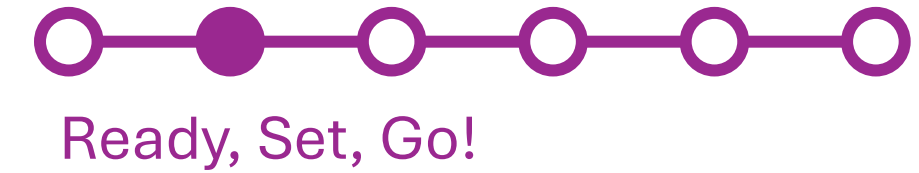


Scheduling, purpose, agenda,
role clarity, pre-work



Prep: Make AI Work for You!

Get time back as a facilitator!



Common Pitfall 1

Unclear purpose or agenda



Kickstart a clear purpose, desired outcomes, and clarify roles

Common Pitfall 2

Not enough time allotted



Plan the right meeting length, time boxes, what must be decided versus deferred, and for a cadence of meetings

Common Pitfall 3

Too much time spent on updates

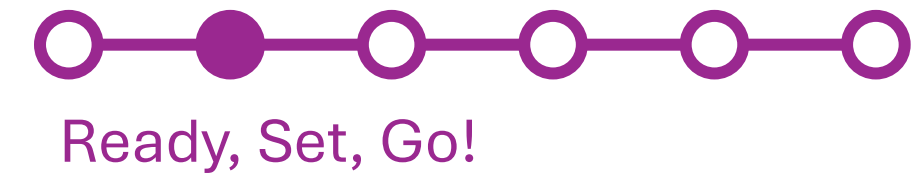


Summarize pre-reads and updates ahead of time so meeting time is used for discussion and decisions



Scenario: Community Convening

Underwater Basket Weavers, a passionate community



The Foundation is hosting a convening of local “Underwater Basket Weavers” to align on shared needs, training opportunities, and maybe support a small pilot grant program to support the field.

A diverse network of community partners working across art, workforce development, education, and environmental stewardship.



Underwater Basket Weavers

Let's Prep!



Ready, Set, Go!



Kickstart a clear purpose, desired outcomes, and clarify roles



Plan the right meeting length, time boxes, what must be decided versus deferred, and for a cadence of meetings



Summarize pre-reads and updates ahead of time so meeting time is used for discussion and decisions

“

Help me draft a clear purpose statement and three desired outcomes for a 60-minute community partner convening about underwater basket weaving

”

“

Create a 60-minute convening agenda with time boxes, facilitator language, and at least one interactive component

”

“

Develop a summary of what participants should know and prepare for that I can put on the top of the participant agenda

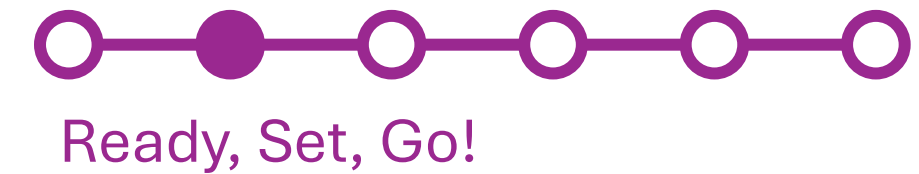
”

Demo



Prep: Make AI Work for You!

Be a more equipped participant!



Common Pitfall 1

Did not have time to read everything



Summarize key materials into what I need to know

Common Pitfall 2

Not sure what I am supposed to contribute



Kickstart my talking points and one strong question

Common Pitfall 3

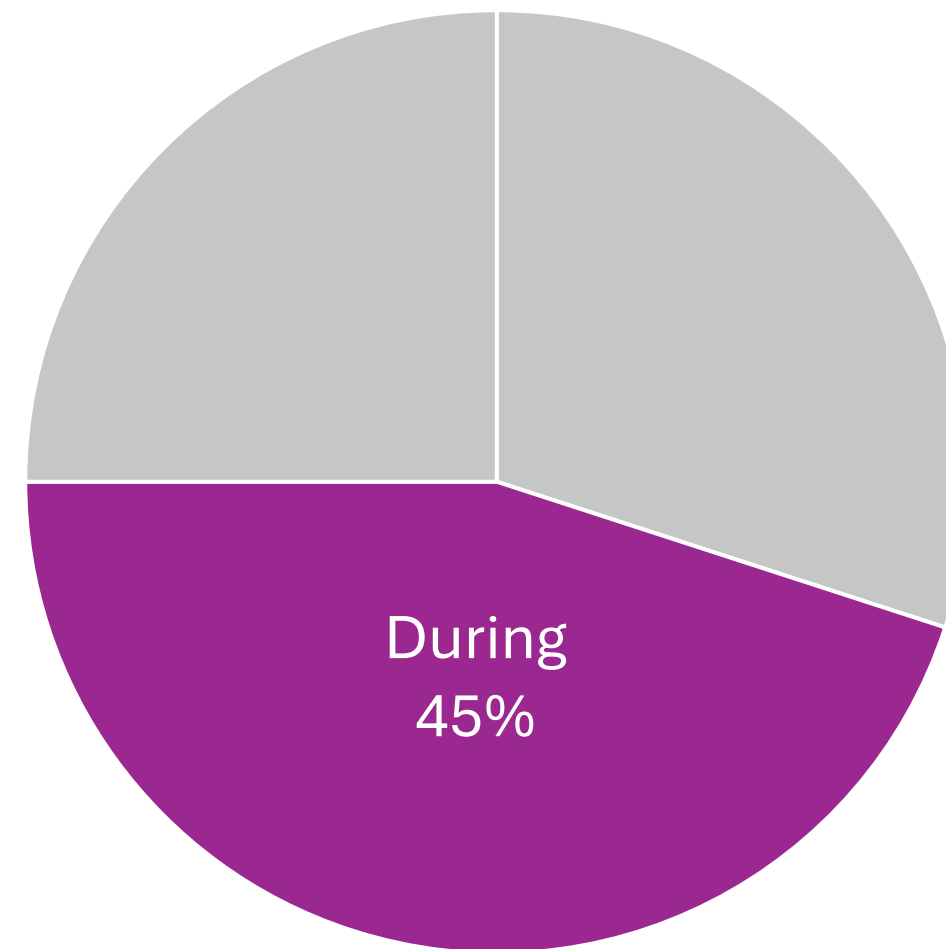
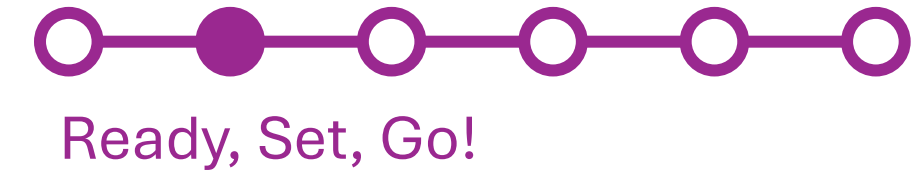
Do not want to be unprepared for the decision



Plan my position, tradeoffs, and what I need to confirm



Ideal Meeting Effort Balance

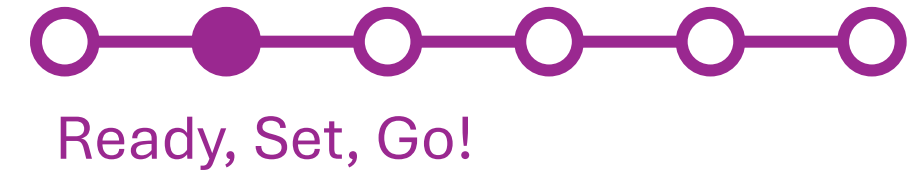


Discussion, decisions,
alignment, next steps



During: Make AI Work for You!

Remember SPARK Framework (facilitators + participants)



Common Pitfall 1 Meetings that run long



Aadapt in real time by tightening questions, reordering the agenda, and resetting priorities

Common Pitfall 2 Decisions getting buried in conversation



Summarize decisions in plain language as they emerge so they do not get lost

Common Pitfall 3 People leaving with different understandings



Refine the “what we agreed” recap into one clear, shared version before people leave



During: Record

AI Can Turn Recordings into Clarity and Follow-through



Ready, Set, Go!

Before you Record

- Get verbal consent from all participants
- Place the device centrally for clear audio
- There are some meetings that should *never* be recorded, e.g., Board meetings

Select a Recording Tool



Microsoft Teams
Recommended



Voice Memo (iPhone)



Voice Recording (Android)

After you Record

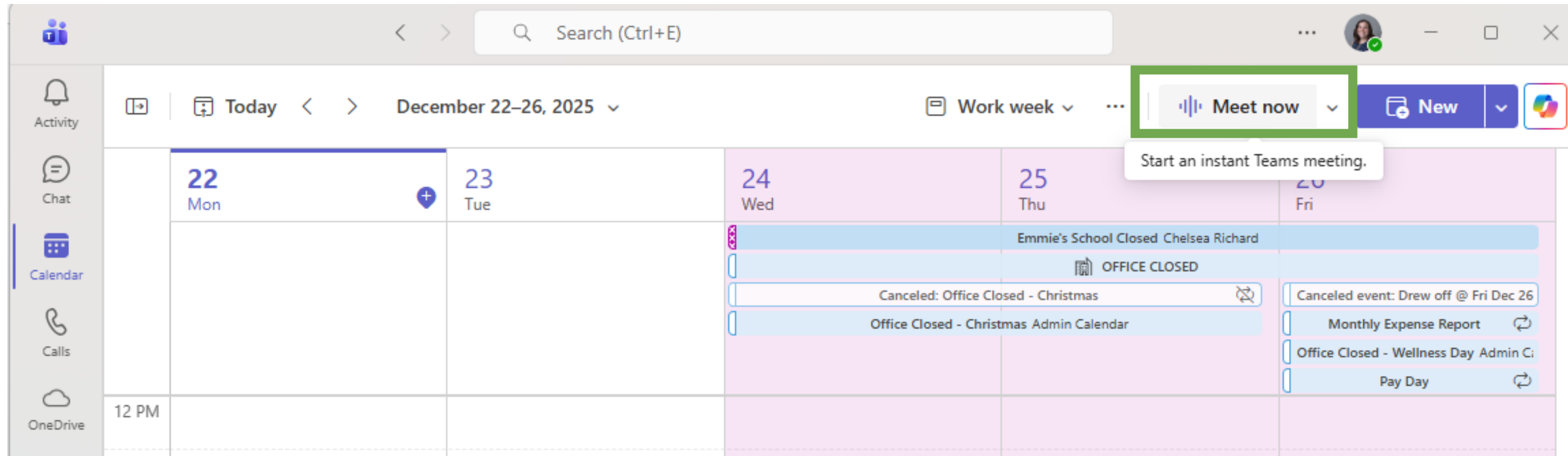
- Resulting file will be a detailed transcript (.docx) or an audio file (.m4a)
- If audio file, need to obtain transcript (can do in Word)
- ChatGPT cannot currently listen to audio files
- Upload transcript into ChatGPT and prompt to get what you need



During: Record

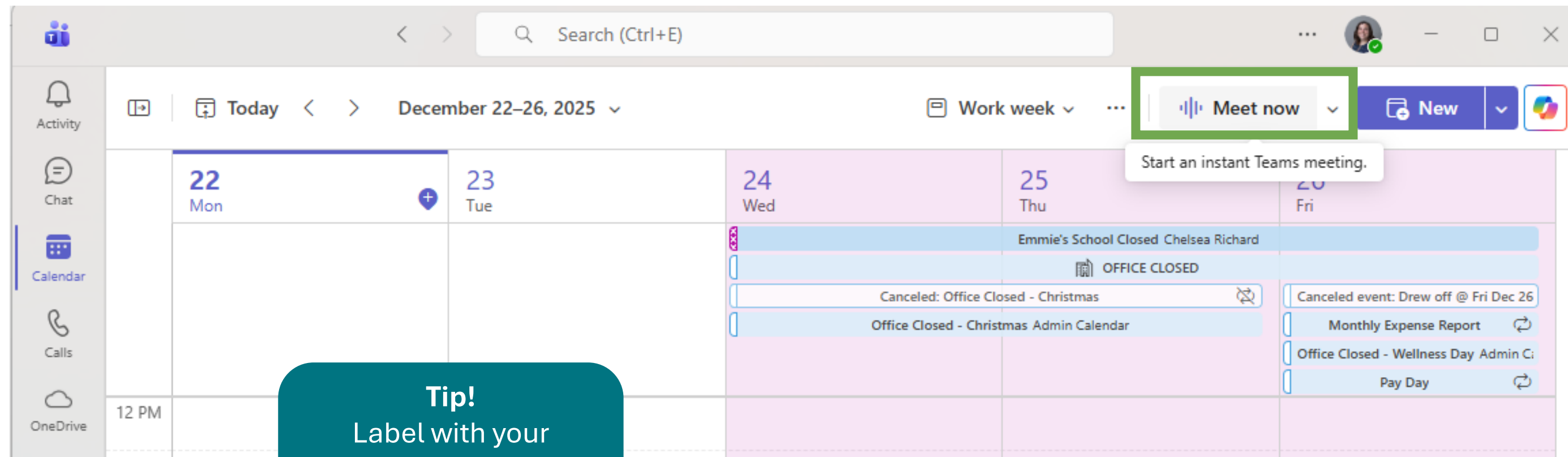
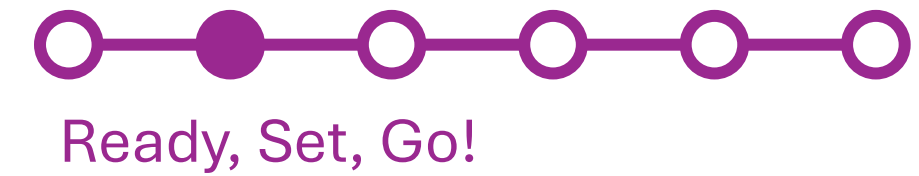
Transcribe an In-Person or Virtual Meeting with Microsoft Teams

Ready, Set, Go!



During: Record

Transcribe an In-Person or Virtual Meeting with Microsoft Teams



Tip!
Label with your
meeting title and date
to make it easier to find
later

Start a meeting now

Meeting name

Meeting with Chelsea Richard

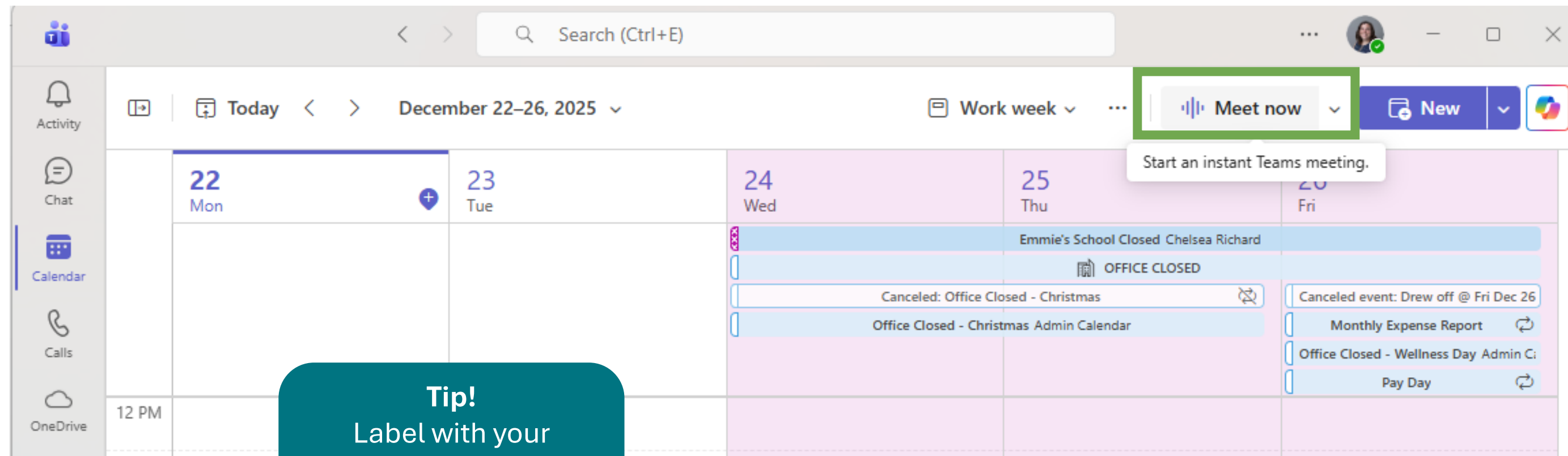
 Start meeting  Get a link to share



During: Record

Transcribe an In-Person or Virtual Meeting with Microsoft Teams

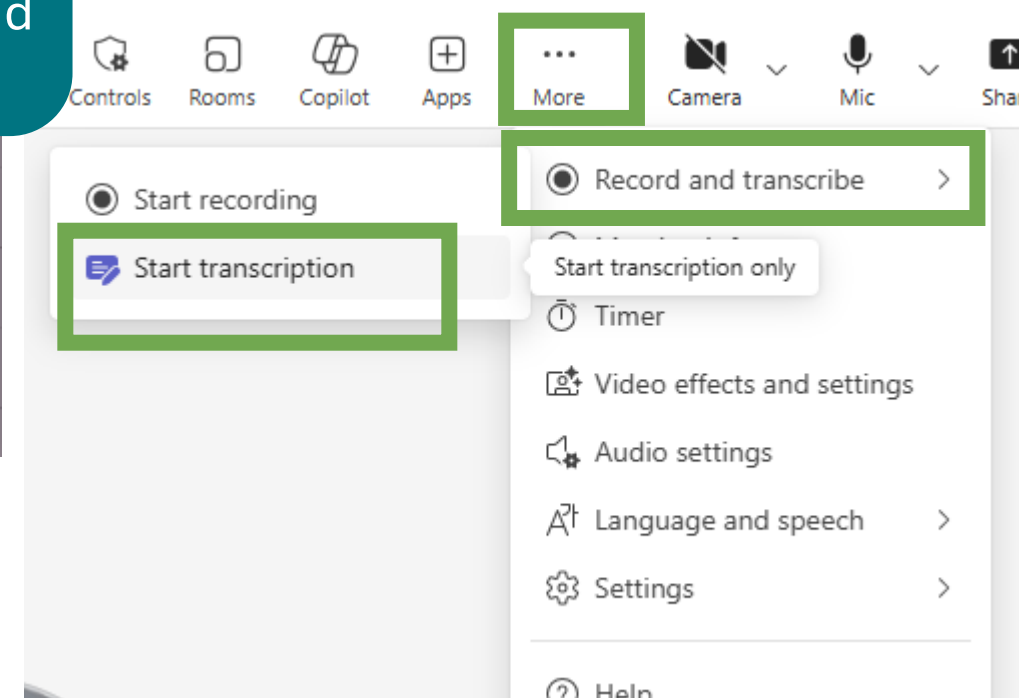
Ready, Set, Go!



Tip!
Label with your
meeting title and date
to make it easier to find
later

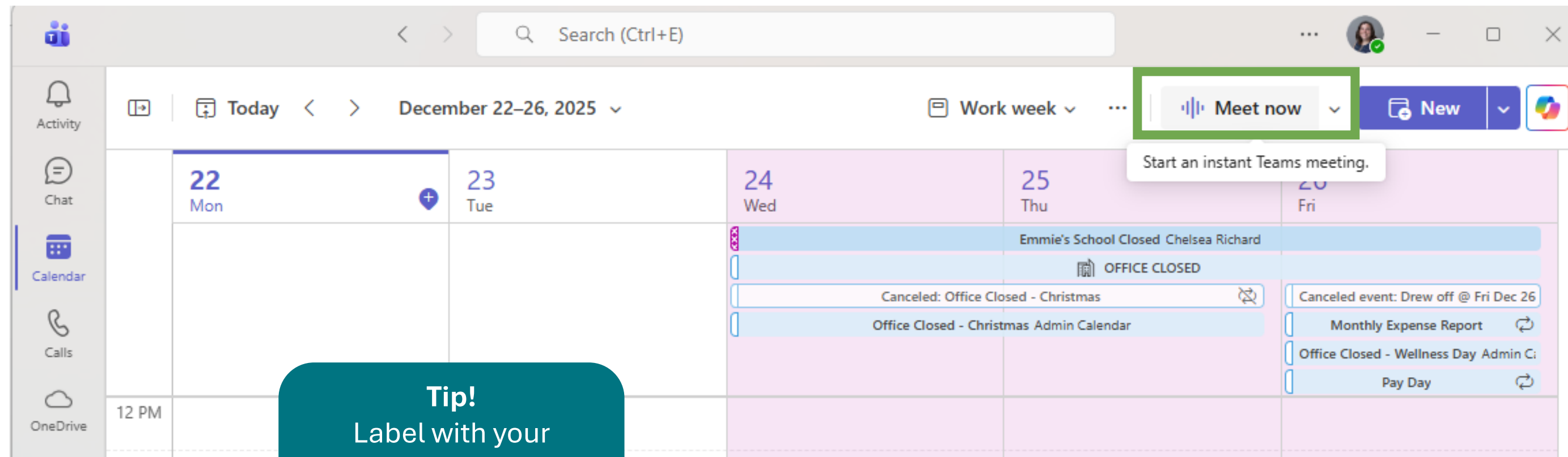
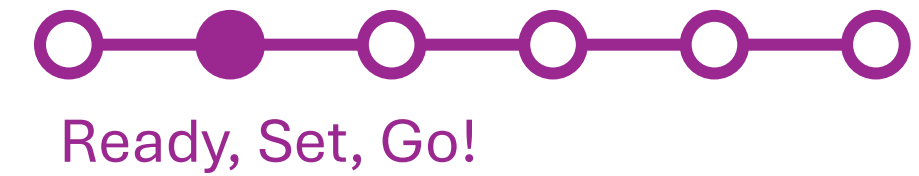
Start a meeting now

Meeting name
Meeting with Chelsea Richard



During: Record on a Laptop

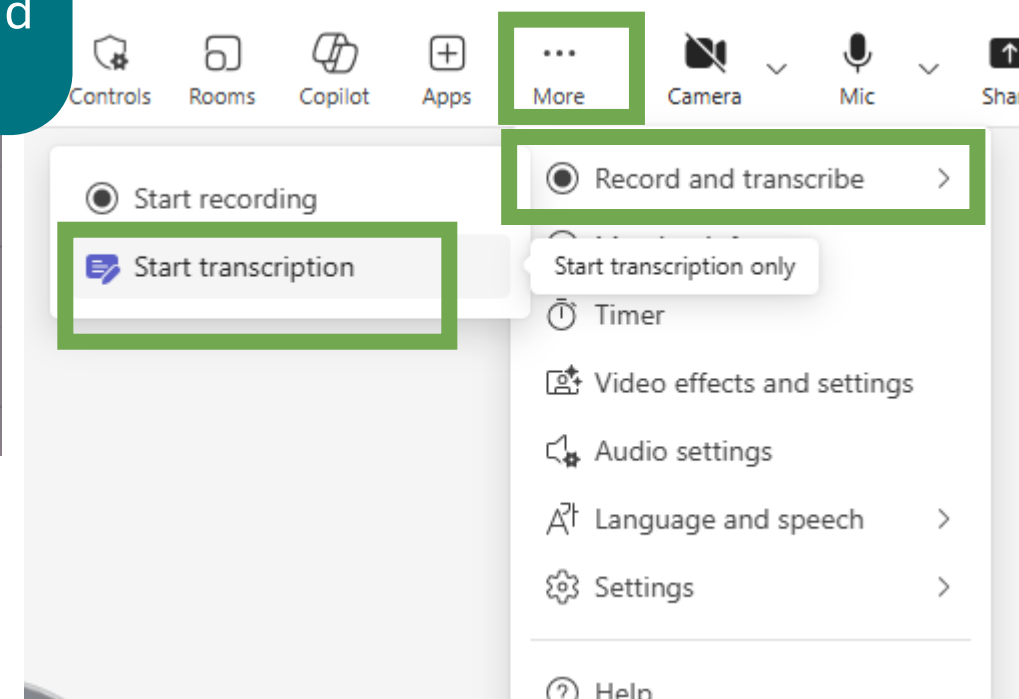
Transcribe an In-Person or Virtual Meeting with Microsoft Teams



Tip!
Label with your
meeting title and date
to make it easier to find
later

Start a meeting now

Meeting name
Meeting with Chelsea Richard



What language is everyone speaking?

Select the correct language to ensure the accuracy of features that process audio.

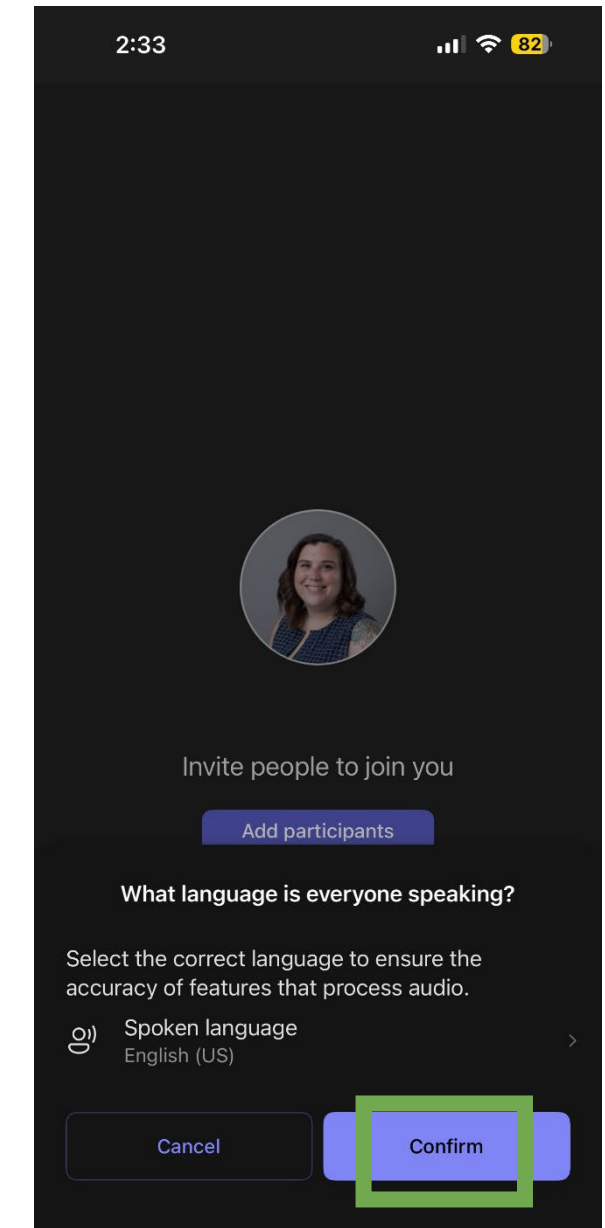
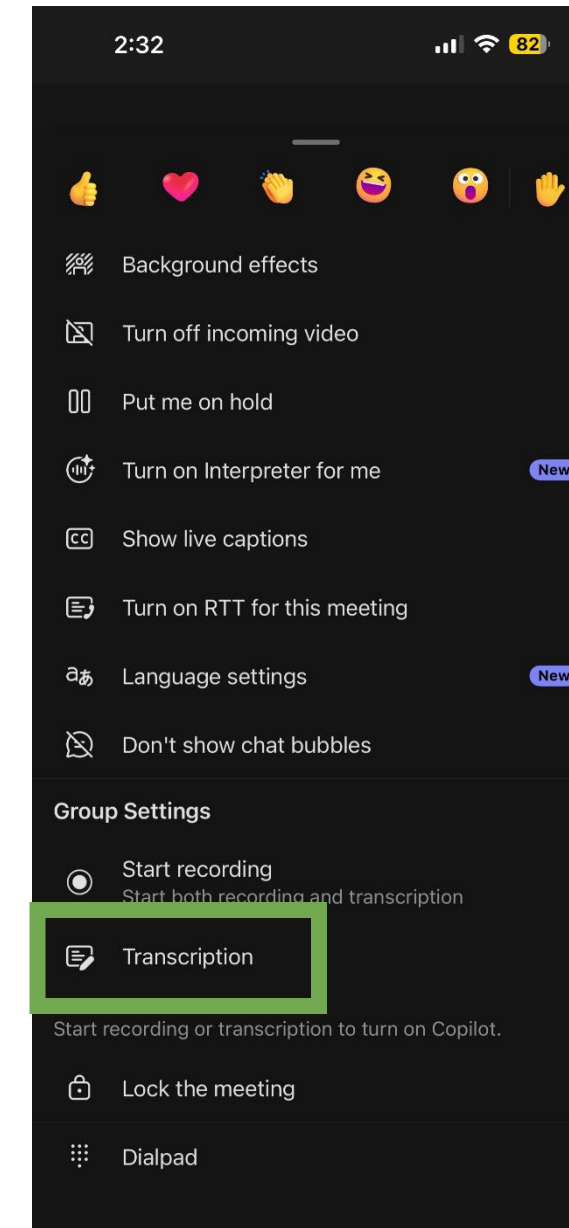
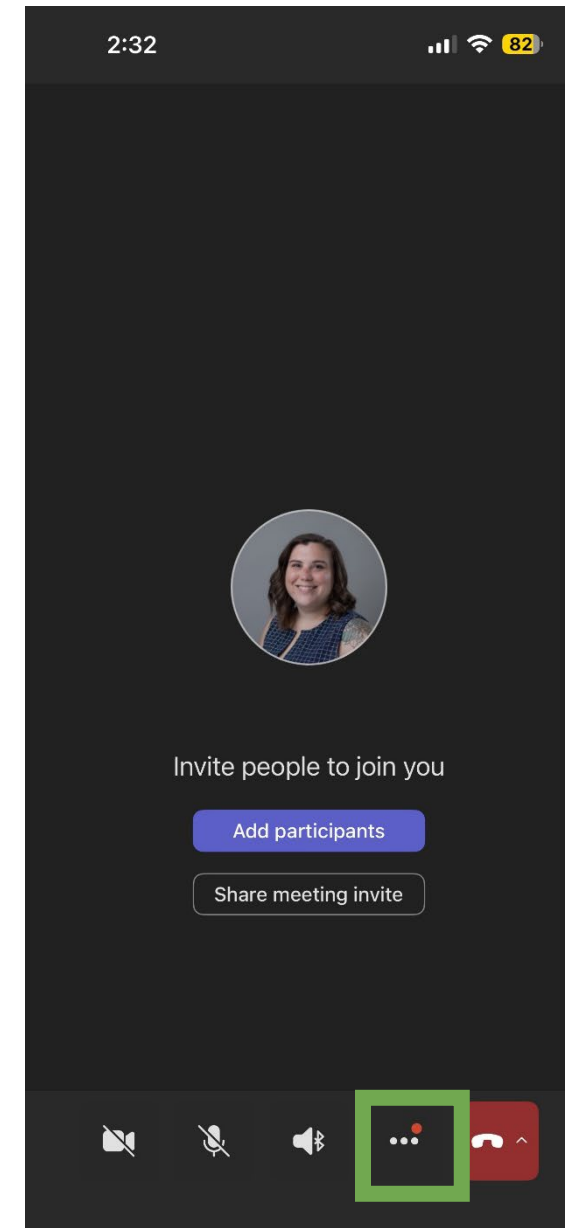
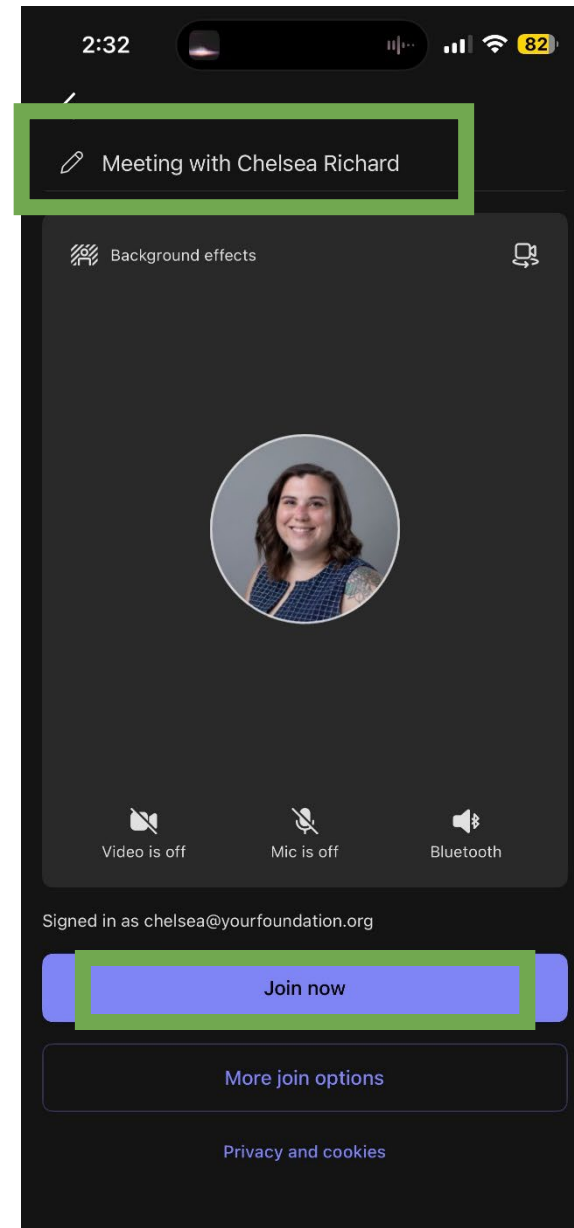
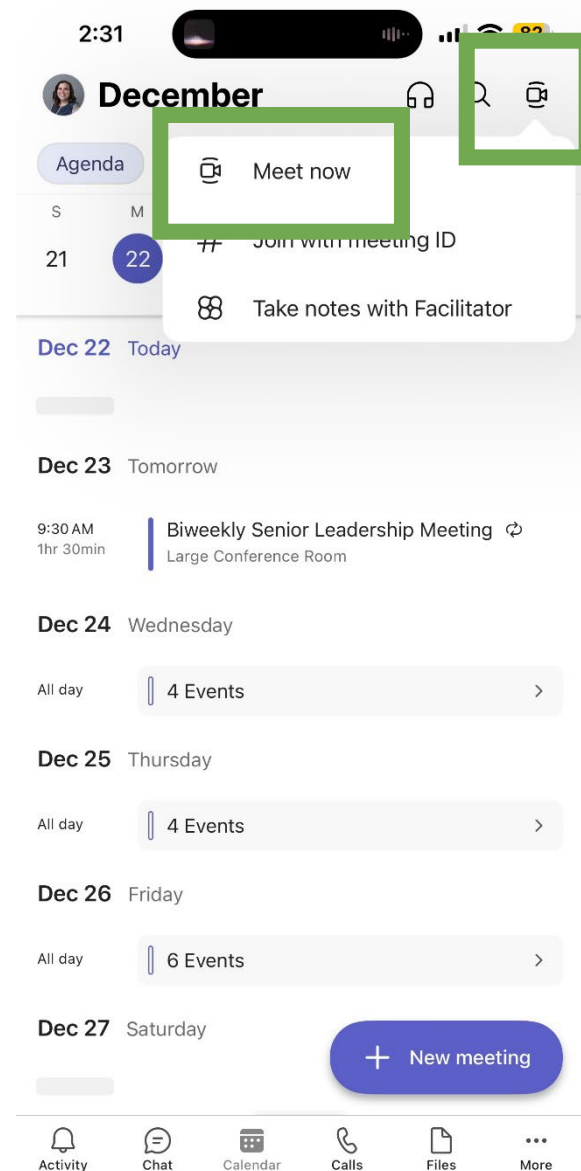
Spoken language
English (US)



During: Record on a Phone

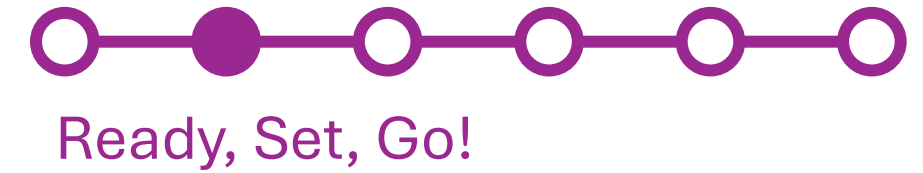
Transcribe an In-Person or Virtual Meeting with Microsoft Teams

Ready, Set, Go!



During: Forget AI! Do you

Remember the underwater basket weavers



Ready, Set, Go!

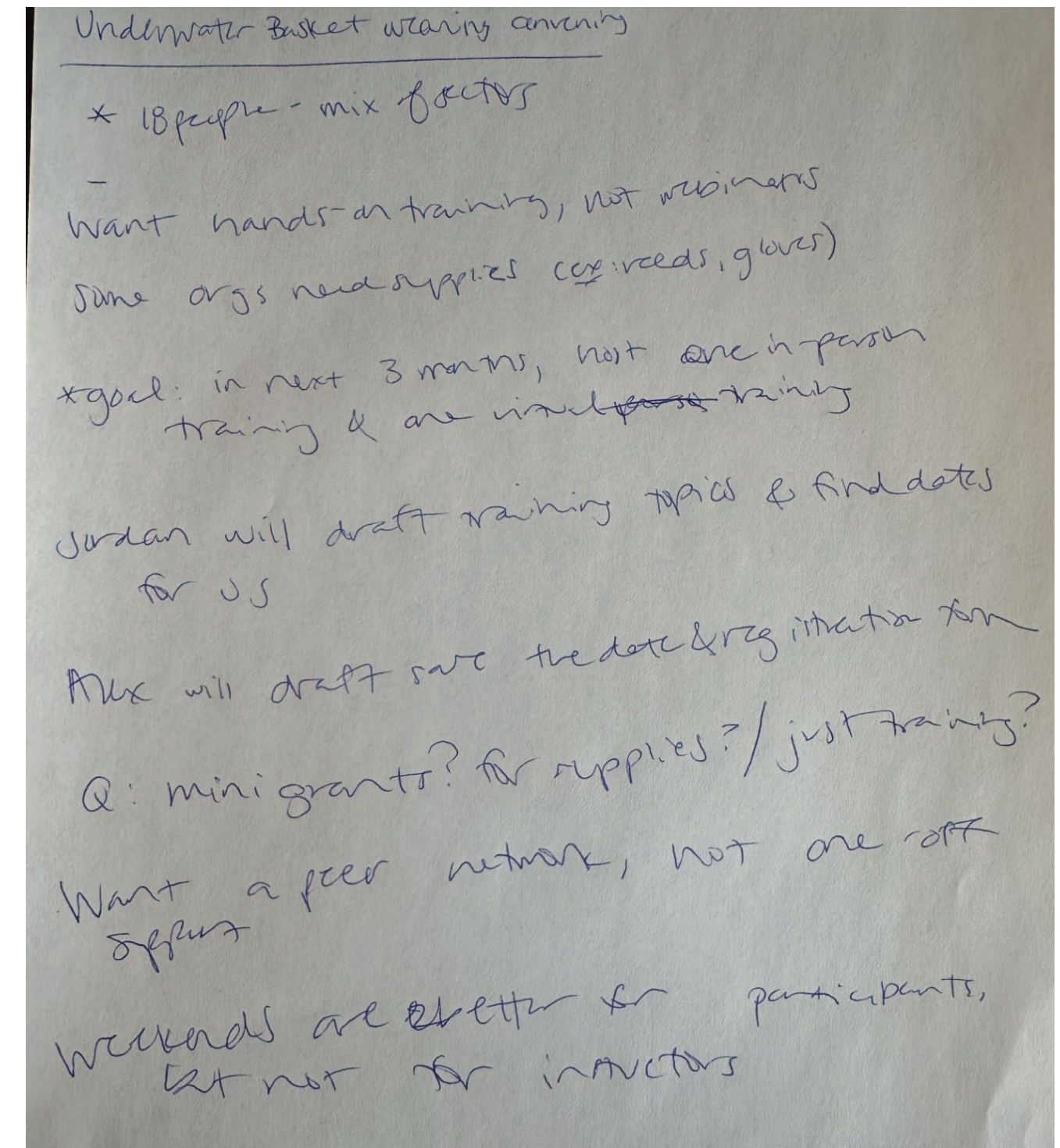
Thanks for the tips, but those tools feel intrusive and inauthentic

I don't want to use AI in the meeting

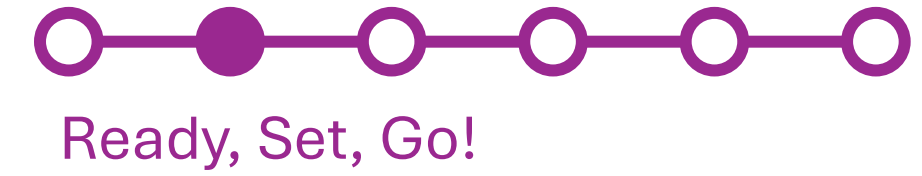
This is a group that may or may not know each other or us

I want them to build connection genuinely & introducing AI in the room may take away from that

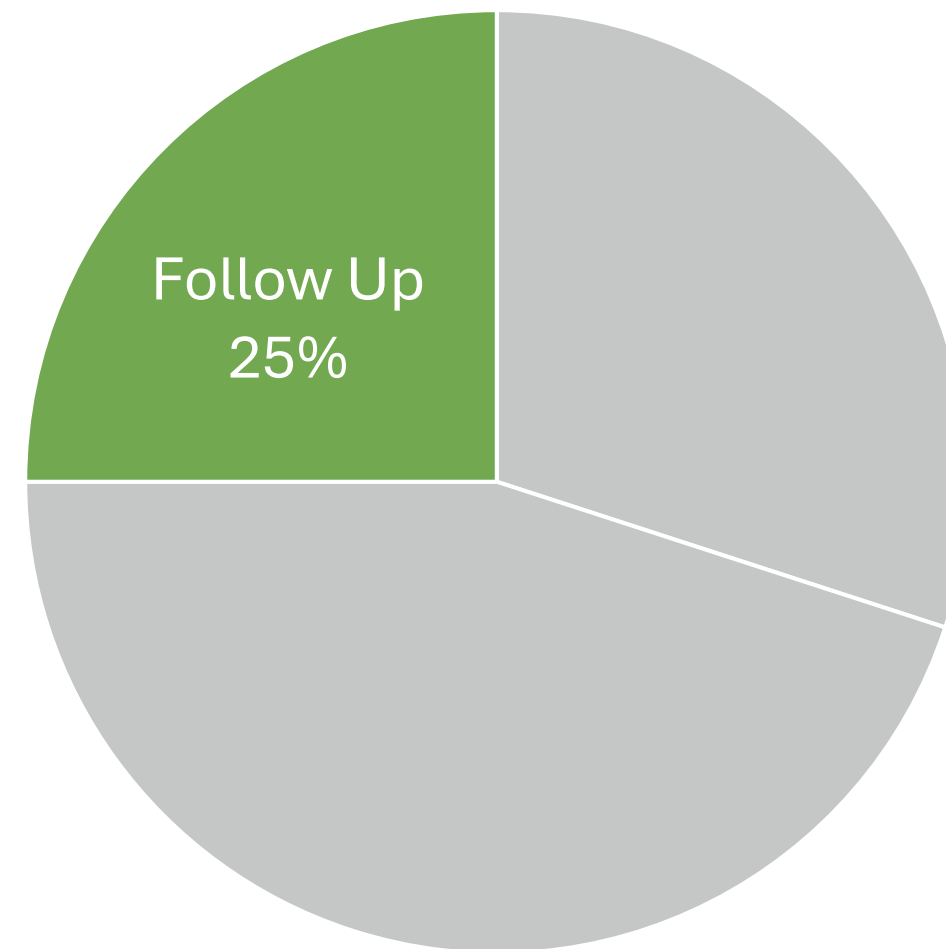
So, I am going to take handwritten notes during the meeting



Ideal Meeting Effort Balance

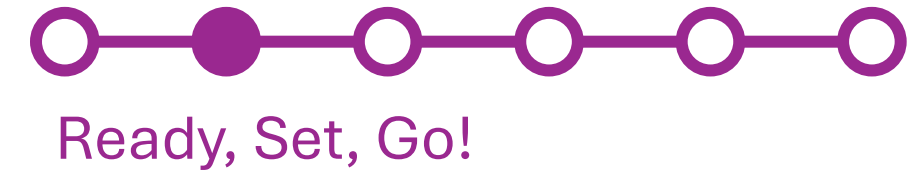


Summary, action items,
progress, resolution



Follow-Up: Make AI Work for You!

Make progress as a facilitator!



Common Pitfall 1

Action items are unclear or forgotten



Plan a clear task list with owners, deadlines, and next steps

Common Pitfall 2

Messy or inconsistent notes



Refine notes into a usable, structured summary

Common Pitfall 3

Rehashing the same topics in multiple meetings

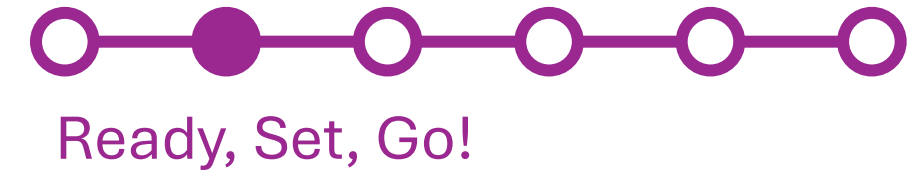


Summarize outcomes and unresolved items so the next meeting starts with clarity

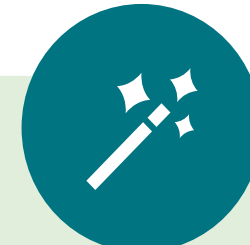


Follow-Up: Make AI Work for You!

Make progress as a facilitator!



Plan a clear task list with owners, deadlines, and next steps



Refine notes into a usable, structured summary



Summarize outcomes and unresolved items so the next meeting starts with clarity

“

Summarize the convening in 6 bullets for internal staff, focusing on outcomes and what happens next

”

“

OK here are my notes from the meeting - can you help me clean these notes into labeled sections: Key Insights, Decisions, Action Items, Open Questions, and Parking Lot

”

“

Make an agenda for the next convening of the community to discuss the training topics and calendar and revisit the open questions from the first convening so we can begin to tackle those

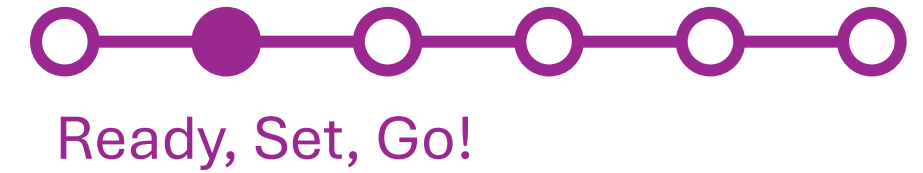
”

Demo



Follow-Up: Make AI Work for You!

Be a more efficient team member



Common Pitfall 1

I forget what I agreed to do



Plan action items into a short checklist with deadlines

Common Pitfall 2

I have competing priorities



Adapt action plan to fit real capacity (what to do now, what to defer, what to delegate)

Common Pitfall 3

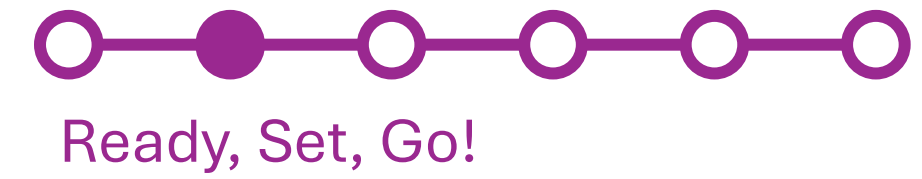
I need to update someone who was not there



Summarize a quick recap for the right audience



Follow Up: Upload Transcript

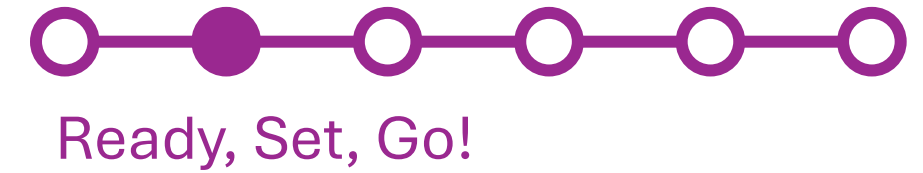


Upload this into ChatGPT with prompts for what you need

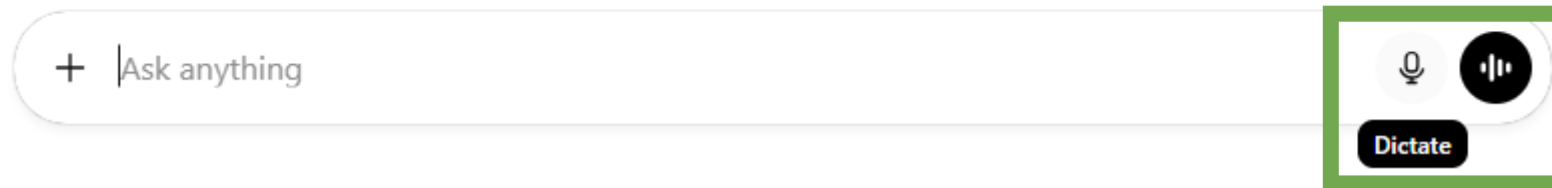
What can I help with?



Follow Up: Brain Dump!



What can I help with?



Dictate: You speak, and your words are turned into typed text in the prompt box
when you know what you want to say, you just do not want to type it

Voice Mode: You talk with ChatGPT in a back-and-forth voice conversation, more like a live assistant
when you are still figuring out what you want and want to talk it out

“Just left the meeting with our AI coach as our second coaching session – we discussed where we were in our project – I owe him a follow up email and he owes me a one-on-one meeting...”





FROM PREP TO FOLLOW UP

Smarter Meetings with AI

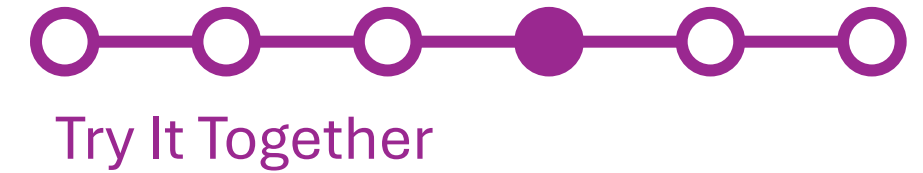
JANUARY 29, 2026 | 12 - 1:30 PM | COLLABORATION ZONE

- Grab Lunch, Get Settled
- Refresh
- Clear Plates, Open Laptops
- Try It Together
- Let's Talk Use Cases
- Closing and Next Steps



Your turn! Pair & share

Use SPARK and iteration to turn a rough idea into a product you would actually use!



Team up with your partner

Start with the scenario

Prompt ChatGPT for a first draft

Refine through iteration

Share your best version + one insight



Open Discussion



What is a key takeaway from today? What resonated with you?

What are you excited to try?

Is there a way you recently used AI at work that you want to share?

What challenges or concerns do you still have about using AI?

How would you like us to share tips and learnings as a team going forward?



What's Next?

Keep exploring ChatGPT Business and Copilot in your daily work

Don't let perfect be the enemy of good – Experiment! Have fun!

Apply the SPARK framework to guide your prompts

Share your learnings and great prompts with teammates

Watch for upcoming training sessions and resources

Reach out with questions, ideas, or support needs to members of our AI Implementation Team



Thank you for learning with us!

From, Your AI Implementation Team



Closing and Next Steps



Chelsea Richard
Team Lead



Kate Cherry



Erin Johnson



Georgia Mjartan



Mimi Slade



Alexis Wood

