

From Prep to Follow Up 2.0: *AI and Tech In Action*

Material to start at 12:20

May 26, 2026
Chelsea Richard

- Grab Lunch, Get Settled
- Ready, Set, Go!
- Let's Talk Use Cases
- Closing and Next Steps



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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 ”



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Remember: Prompting like a Pro

Help me with [task].

You're a [persona].

The output should be [format].

You should know that [context].

Here are some [references].

What you want to accomplish

Which expertise to draw from

How the results should appear

Needed background information

Examples

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

Adapted from Grow with Google's "Make AI Work for You"

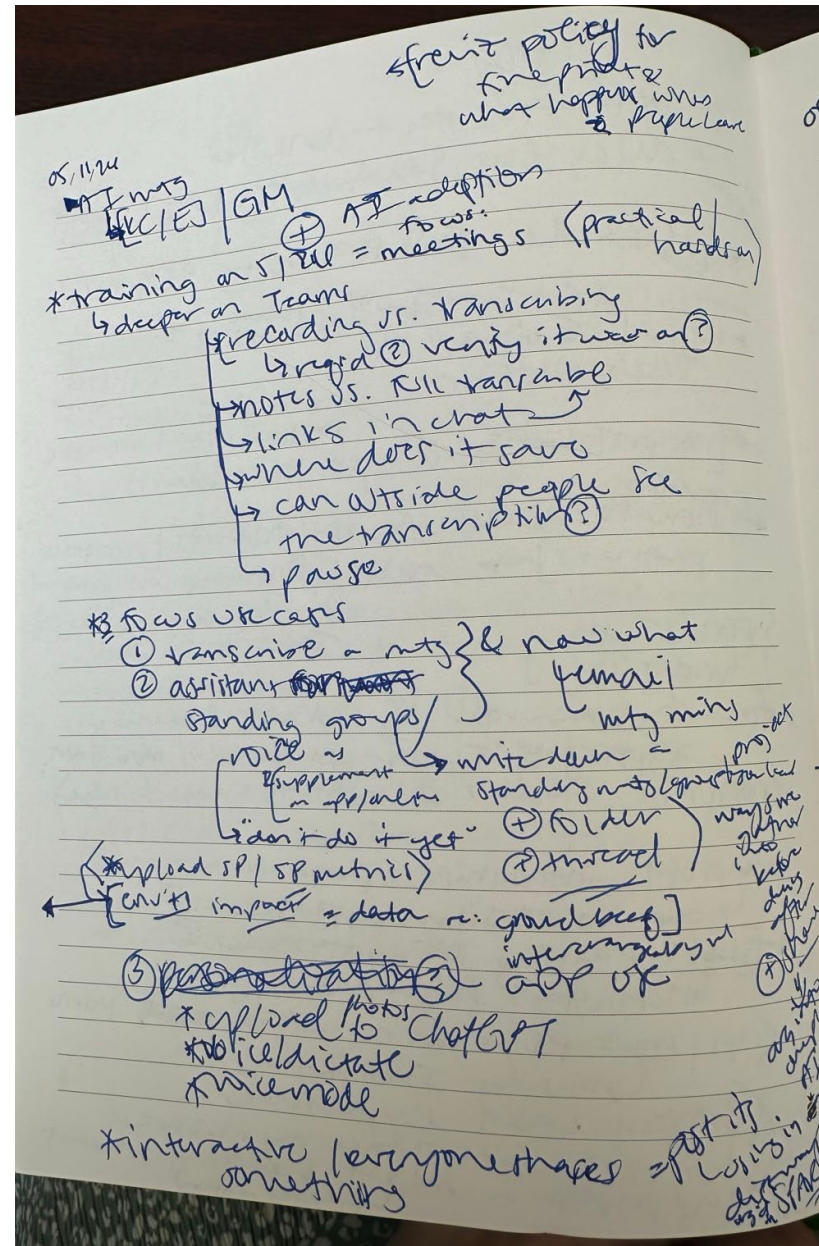


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Remember: Make AI Work for You!

Uploading handwritten notes

Grab Lunch, Get Settled



Prompt:

Here are notes from a meeting regarding an upcoming AI training for staff I will be leading that builds off of our last training. Can you help me build an outline for a training that is 45 mins of front of the room and a half hour of hands on workshop with the title “from prep to follow up 2.0: AI and tech in action”

Follow up:

Focus on the 3 use cases shown in the notes as the bulk of the content



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Phases of AI Adoption

Ready, Set, Go!

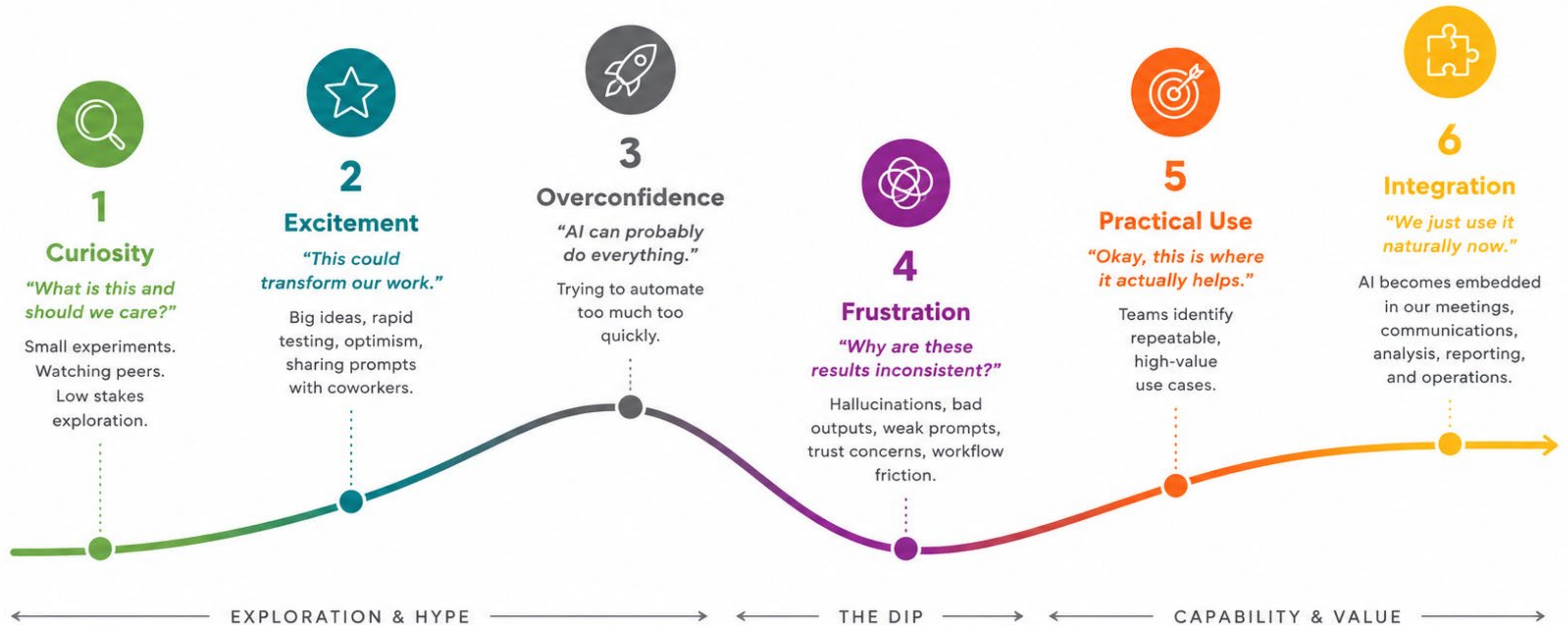
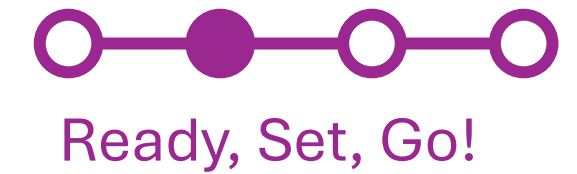


Image generated with ChatGPT



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Today's Focus



- **Capture:** Meeting transcription + summaries
- **Organize + Follow Up:** Workflow support
- **Interact + Create:** Interactive tools



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Capture

Meeting transcription + summaries



Ready, Set, Go!

DEMO
Start Recording

We will come back to this!



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Capture

Meeting transcription + summaries



Ready, Set, Go!

The screenshot displays the Microsoft Teams application window. At the top, there's a search bar and a user profile icon. Below the navigation bar, the calendar view is active, showing the week of December 22-26, 2025. The 'Meet now' button is highlighted with a green box, and a tooltip indicates 'Start an instant Teams meeting.' The calendar grid shows events for Wednesday, December 24th, including 'Emmie's School Closed Chelsea Richard', 'OFFICE CLOSED', 'Canceled: Office Closed - Christmas', and 'Office Closed - Christmas Admin Calendar'. For Friday, December 26th, events include 'Canceled event: Drew off @ Fri Dec 26', 'Monthly Expense Report', 'Office Closed - Wellness Day Admin Ci', and 'Pay Day'. The left sidebar shows icons for Activity, Chat, Calendar, Calls, and OneDrive.



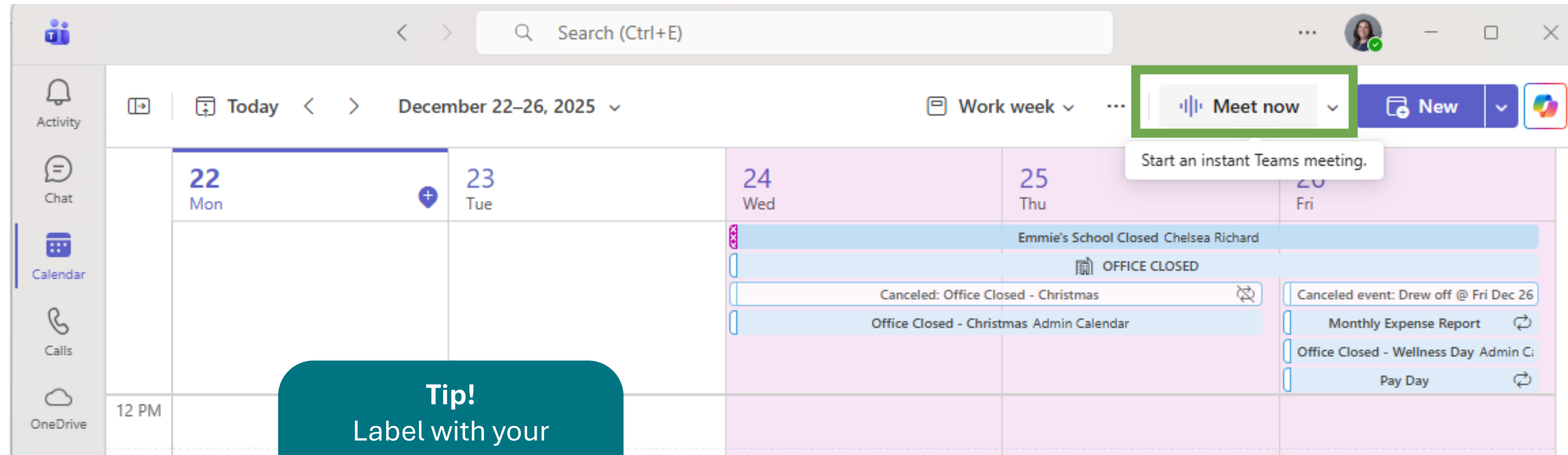
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Capture

Meeting transcription + summaries



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

 Start meeting  Get a link to share



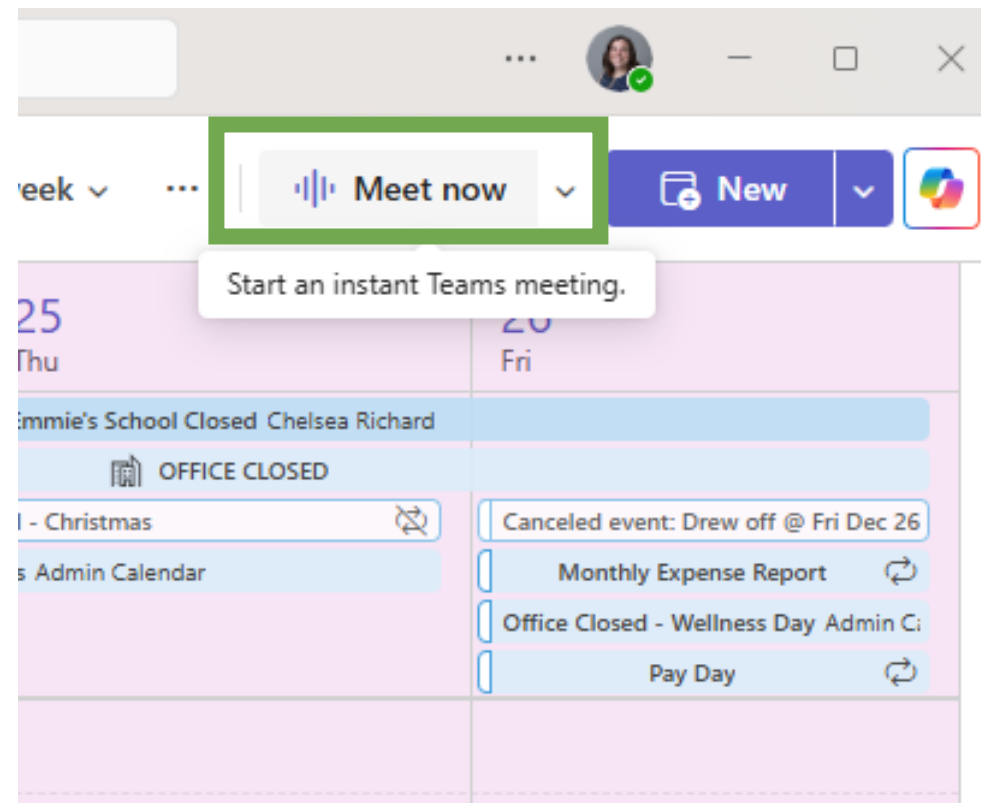
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Capture

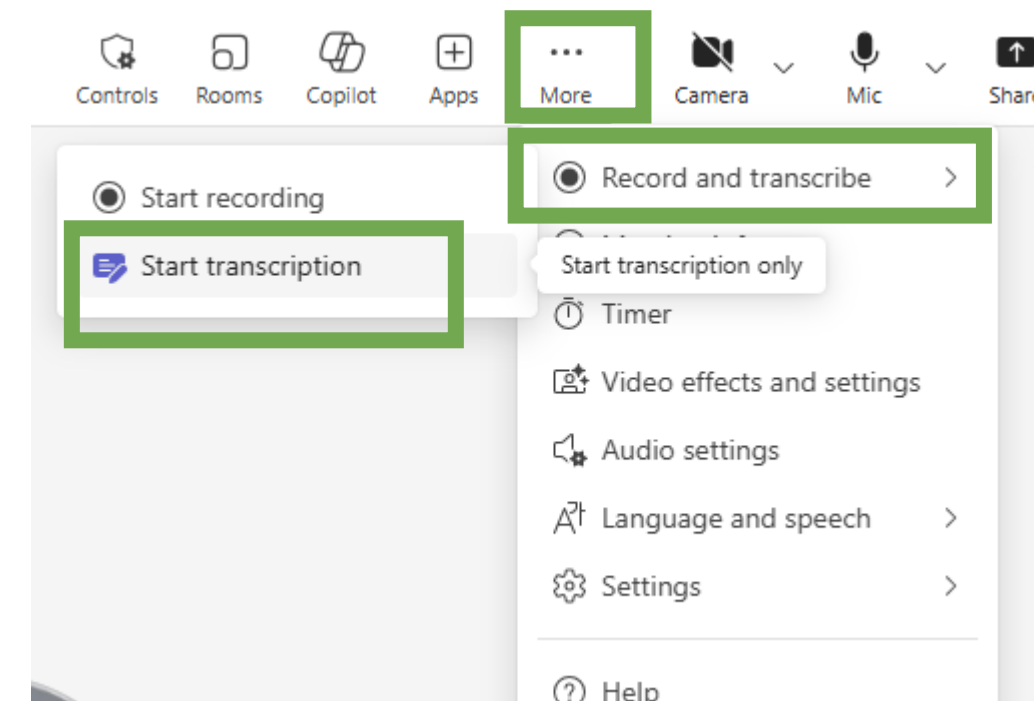
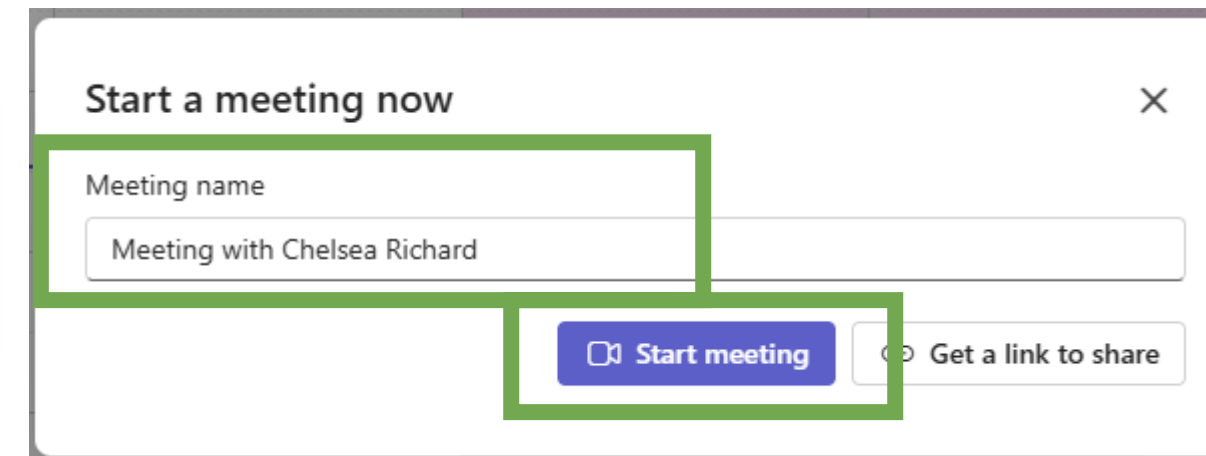
Meeting transcription + summaries



Ready, Set, Go!



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



Note re: difference between recording and transcribing



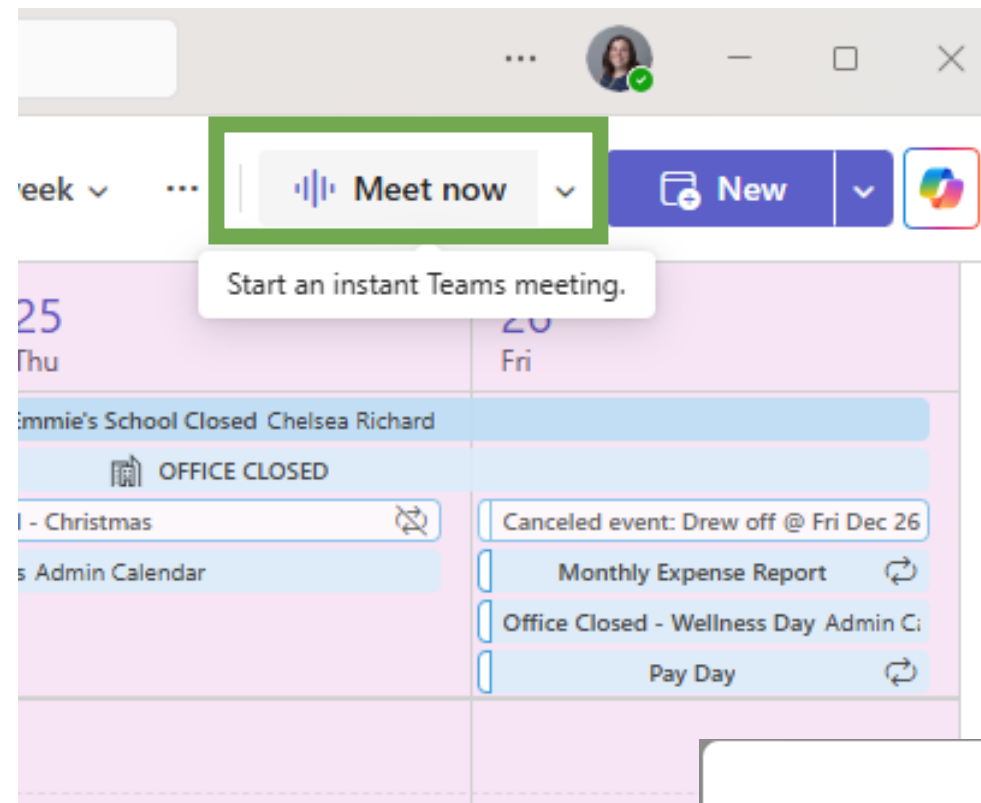
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Capture

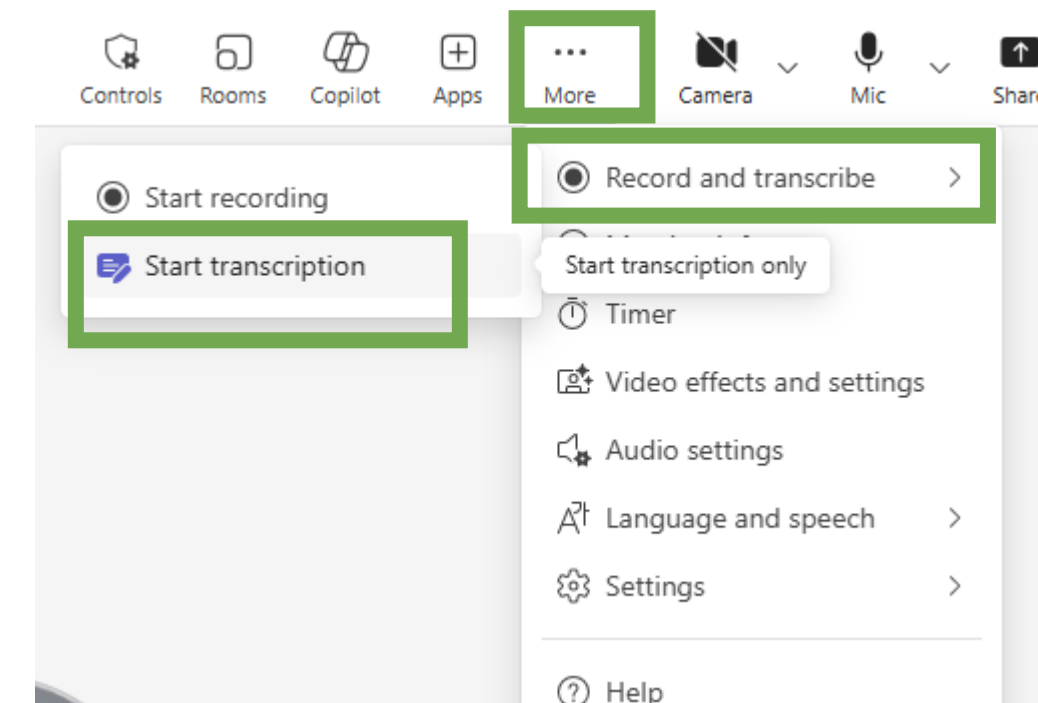
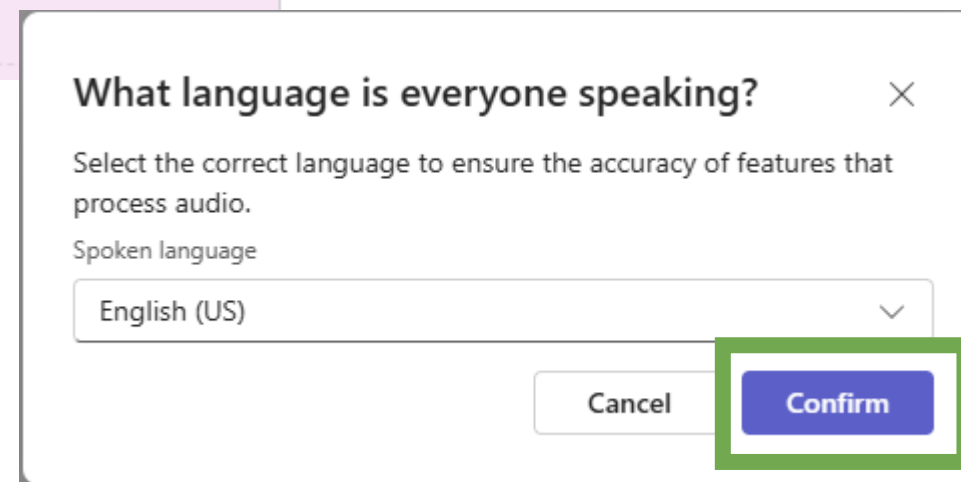
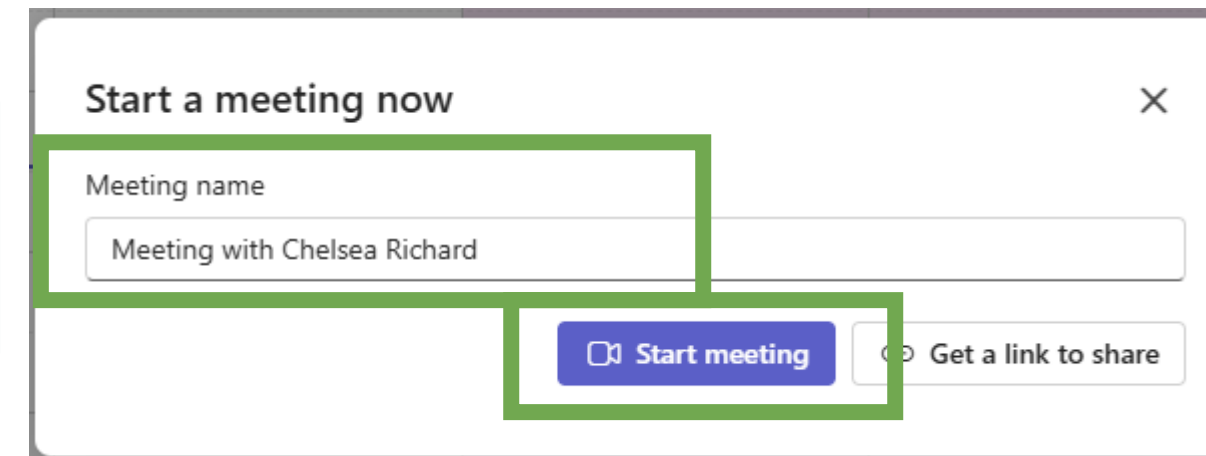
Meeting transcription + summaries



Ready, Set, Go!



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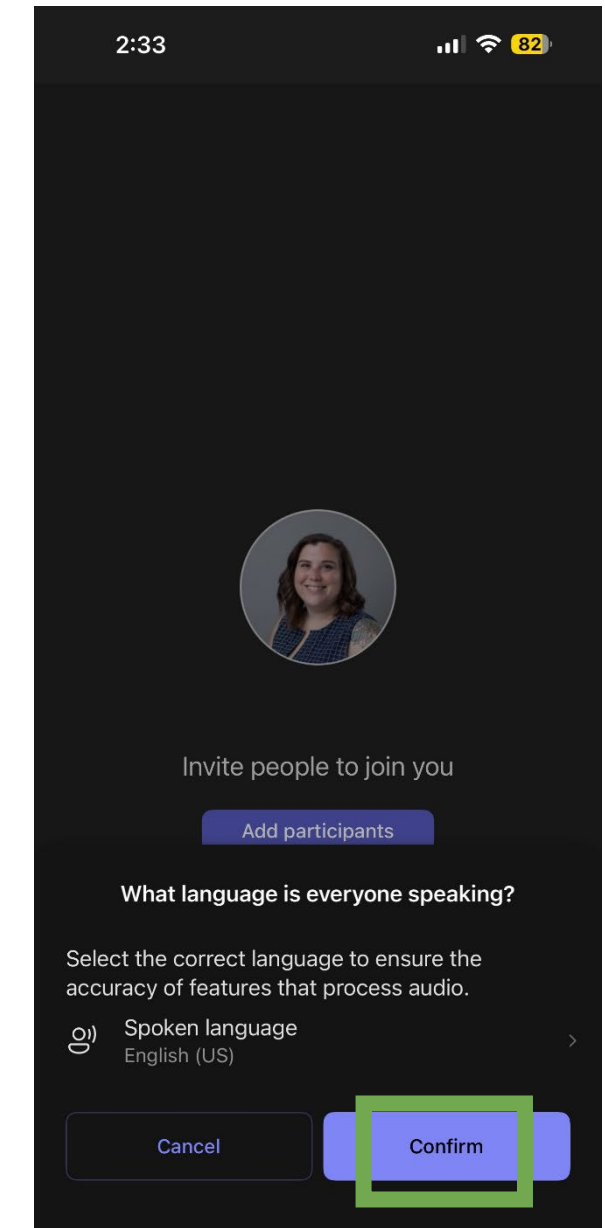
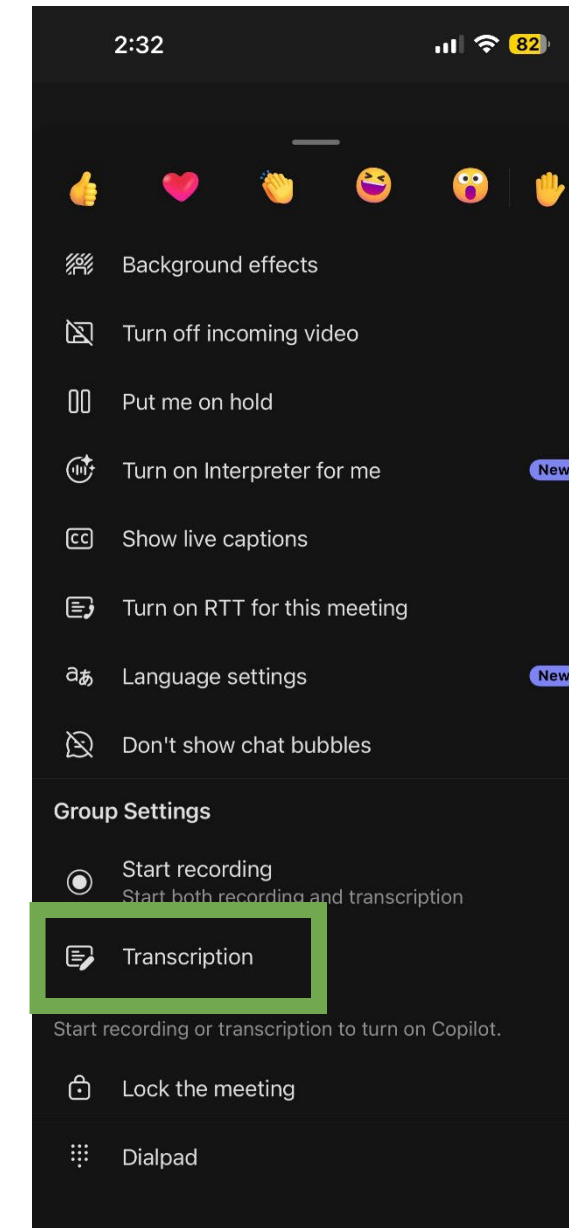
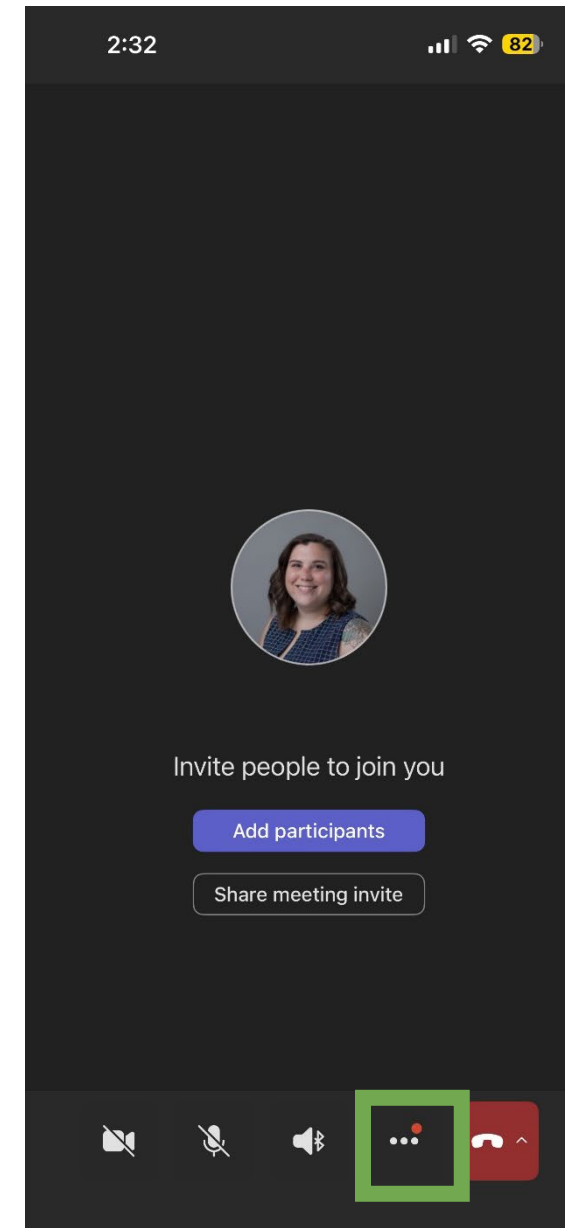
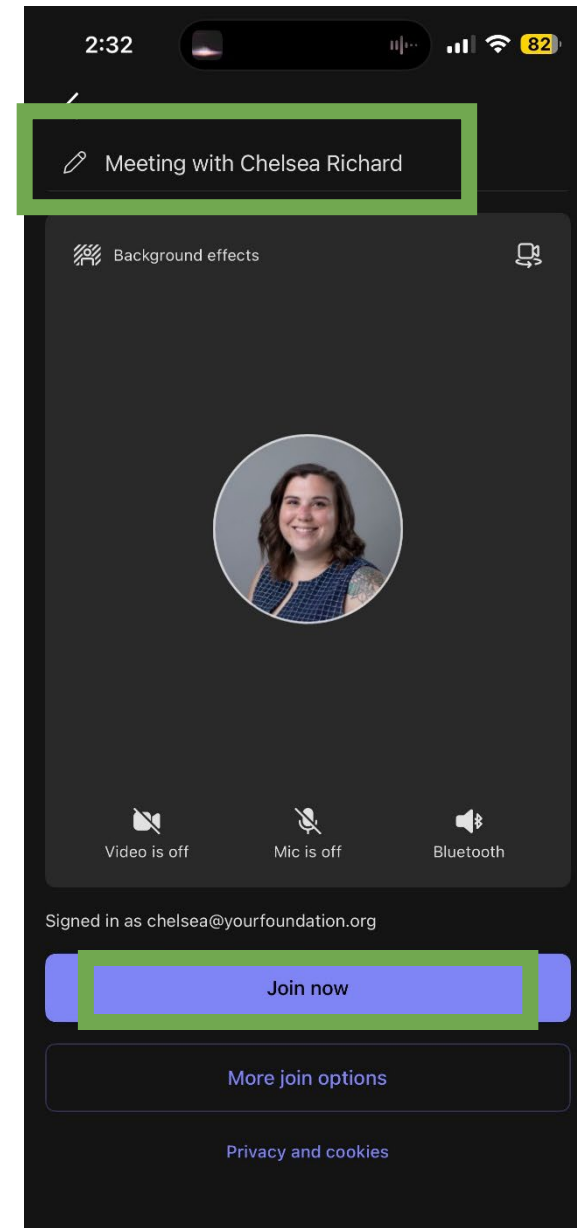
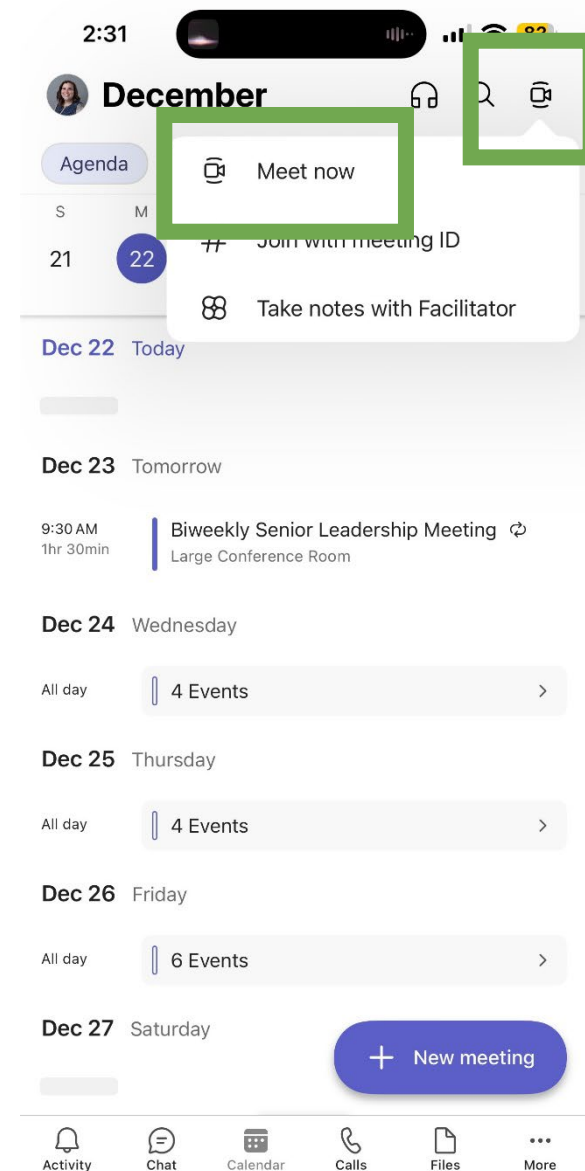
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Capture

Meeting transcription + summaries



Ready, Set, Go!



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Organize + Follow Up

Workflow support: Projects



Ready, Set, Go!

The screenshot displays the ChatGPT interface. On the left sidebar, under the 'Projects' section, the 'Community Assessment' project is highlighted with a green box. A green arrow points from this box to the 'Community Assessment' header in the main chat area. The main area shows a list of chat messages under the 'Chats' tab, including 'Aggressive ZIP Validation', 'Survey Spam Detection Analysis', 'Traducción al español', 'Resident Survey Email Draft', and 'Survey Introduction Revision'.

ChatGPT

- New chat
- Search chats
- Library
- Apps
- Agents NEW
- Deep research
- Codex
- GPTs**
- Central Carolina Community...
- Explore GPTs
- Projects**
- New project
- Community Assessment**

Community Assessment

+ New chat in Community Assessment Instant ▼  

Chats Sources

- Aggressive ZIP Validation** May 21
29135 is in calhoun - are you sure you're doing this right?
- Survey Spam Detection Analysis** May 20
ok i dont think youre doing a good job with the email detection - are there tools online that can help with th...
- Traducción al español** May 14
translate: take the resident survey by june 3
- Resident Survey Email Draft** May 14
- Survey Introduction Revision** May 14
ok with this new intro - help me write a brief email to the nonprofit CEOs inviting them to take the survey fro...

DEMO



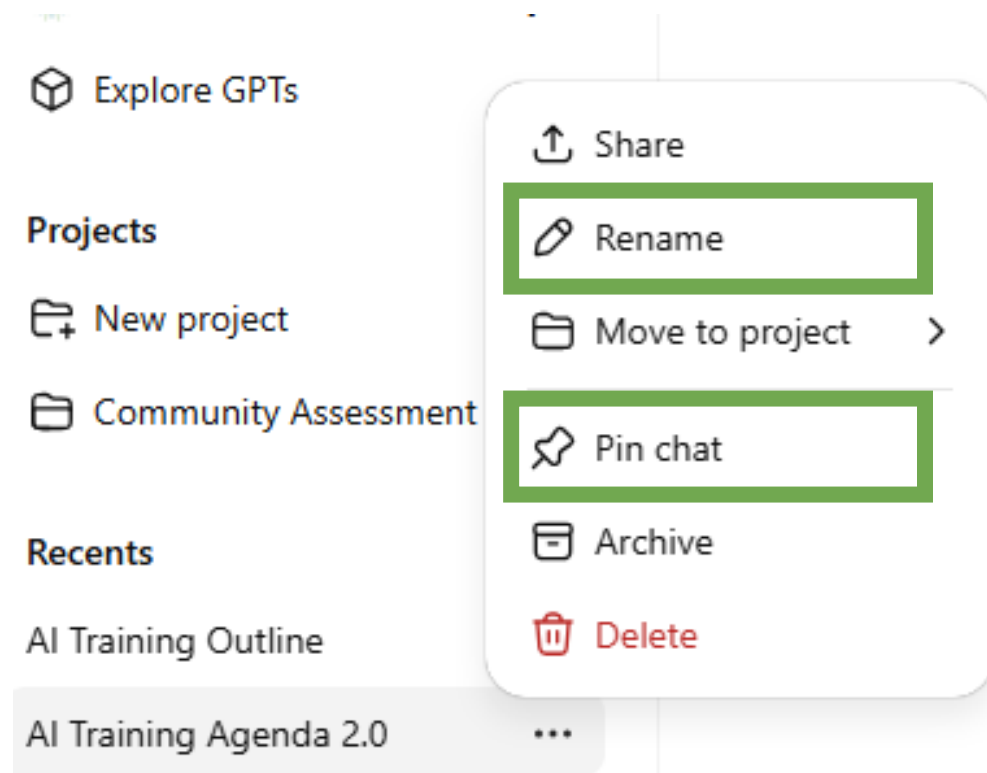
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Organize + Follow Up

Workflow support: Naming Threads + Branching



Ready, Set, Go!



- Meeting support and follow up are immediate opportu
- Consistency improves across standing groups
- AI can significantly reduce drafting and administrative t
- Human judgment

Closing Question

"What is one workflow you think will be most helpful in the next 10 weeks?"



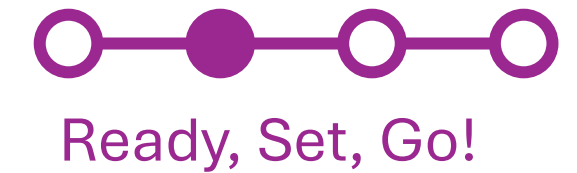
DEMO



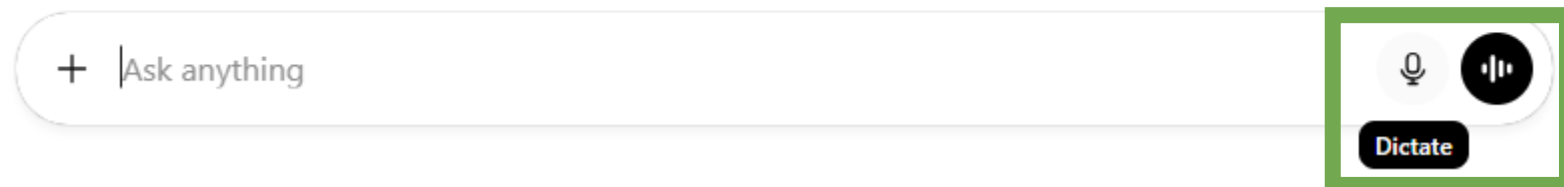
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Interact + Create

Interactive tools: ChatGPT voice options



What can I help with?



DEMO

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

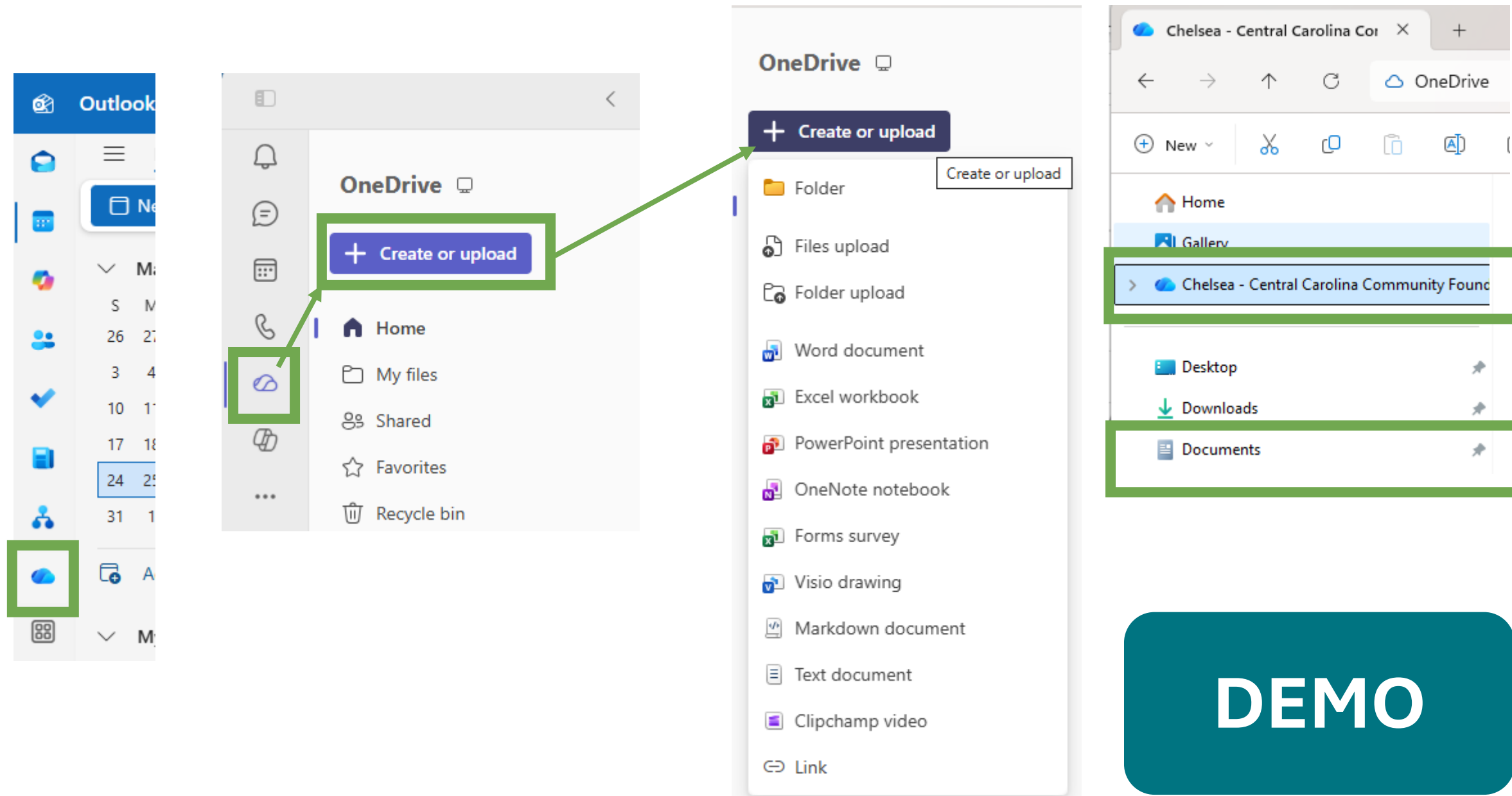


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Interact + Create

Interactive tools: OneDrive and collaborative documents

Ready, Set, Go!



Documents in OneDrive support collaboration because multiple users can be in them at once

Documents autosave



Can be opened in browser or desktop

Good when documents are in progress

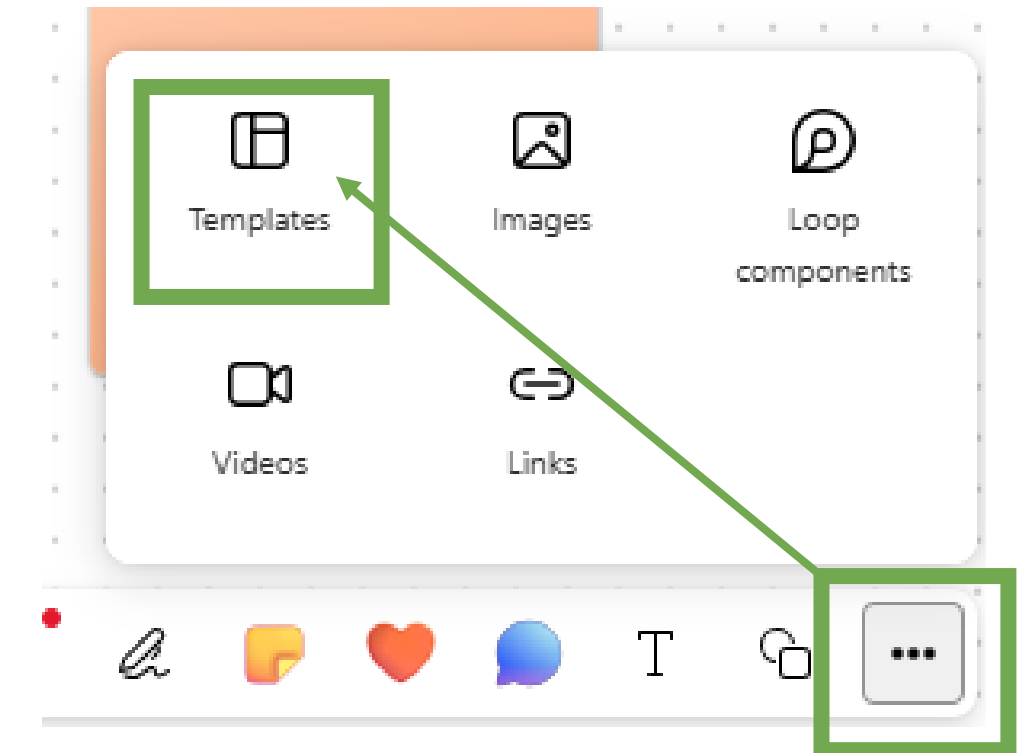
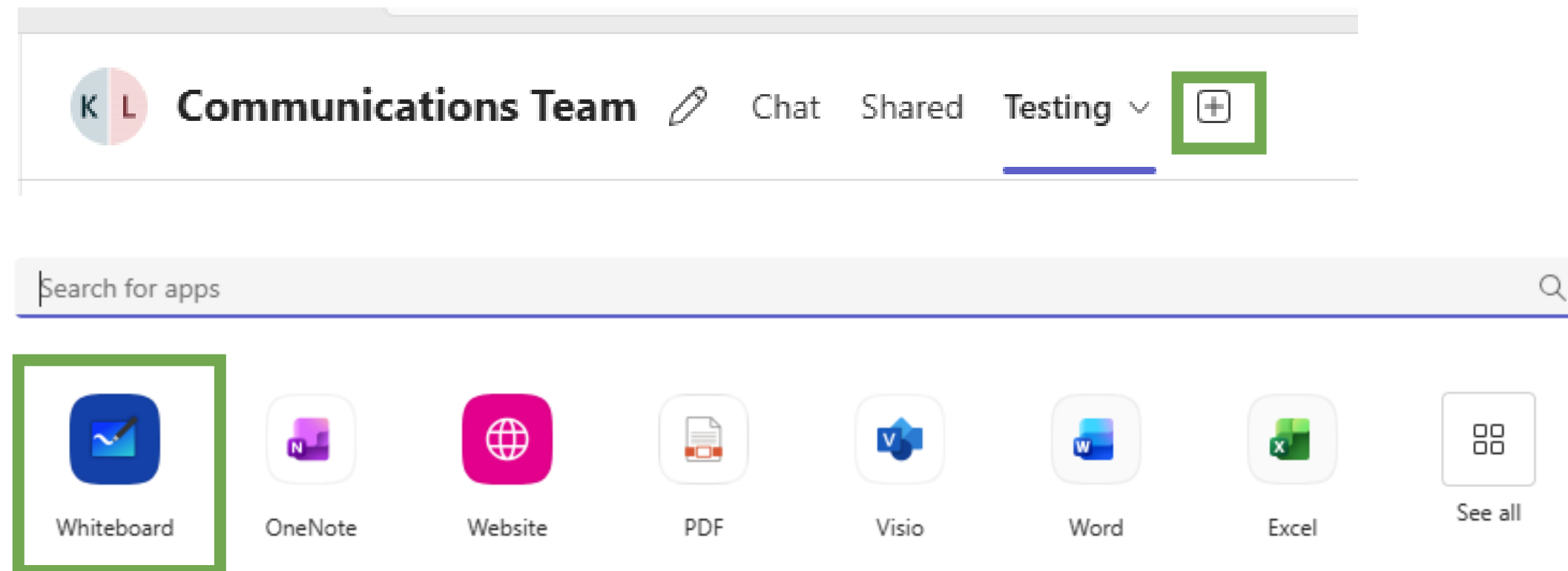
All final documents should be saved on the Shared Drive (F:\)

Interact + Create

Interactive tools: Teams Whiteboard



Ready, Set, Go!



DEMO



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Interact + Create

Interactive tools: Teams Whiteboard



Ready, Set, Go!

**Fun Fact
Alert!**

Symbol	Name	Function
	Start/end	An oval represents a start or end point
	Arrows	A line is a connector that shows relationships between the representative shapes
	Input/Output	A parallelogram represents input or output
	Process	A rectangle represents a process
	Decision	A diamond indicates a decision

Image from [here](#)



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Capture

Meeting transcription + summaries



Ready, Set, Go!

DEMO
Transcript +
Follow Up



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Capture

Meeting transcription + summaries



Ready, Set, Go!

If within project/thread:
Upload this into ChatGPT with
prompts for what you need

What can I help with?



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Discussion in Teams

Advancement, Communications & Operations, Community Investment,
& Finance



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

What are you excited to try? Any standing meetings or processes you could try one of these tools with?

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?



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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

Questions?



Thank you for learning with us!

From, Your AI and Technology Implementation Team


Closing and Next Steps



Chelsea Richard
Team Lead



Kate Cherry



Bob Evans



Erin Johnson



Georgia Mjartan



Alexis Wood



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

☐ 0 hours

☐ 1-3 hours

☐ 4-10 hours

☐ 11+ hours

[Submit Vote](#) [More](#)

Edited

