LEADERSHIP USA ®

UPGRADE Your Team: 7 Steps to Becoming an AI-Empowered Organization

Presented by Julie Holmes

September 16, 2024

LEADERSHIP USA®
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2024 Calendar of Learning Events

LEADERSHIP USA®

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Location:
The Conference Center at RidgeGate
9878 Schwab Way, Suite 401, Lone Tree, CO 80124

Schedule:
8:30 AM registration, 9:00 AM to 12:00 PM meeting
Includes breakfast, materials, and parking

Cost (includes recording):
Live Event (instructor-led): $249 per person (group discounts available)
Live Stream (watch from any location): $129 per person (bulk discounts available)
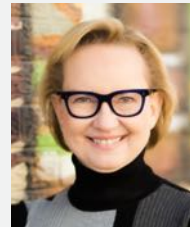
Registration:
Go to LeadershipUSA.com/events, email Nadine@LeadershipUSA.com, or call 303-471-7401

Monday, January 22, 2024

Elaine Dumler presents
**Presentations That Influence Change:
Getting the Right Information . . . to the
Right People . . . in the Right Format**

Monday, February 19, 2024

Cindy Solomon presents
**Building Your Courage: Creating
Engagement, Accountability and Results**

Monday, March 25, 2024

Carolyn Strauss presents
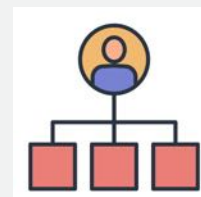**Effective Execution: The Art of Getting
Work Done**

Monday, April 22, 2024

Jon Macaskill presents
**Unleashing the Power of Preparedness, Resilience,
Grit, and Compassion: A Navy SEAL Commander's
Blueprint for Personal Growth**

Monday, May 13, 2024

Jenn Dewall presents

How to Manage Burnout and Overwhelm: Find Joy at Work Again

Monday, June 24, 2024

Richard Bryan presents

Learning to Lead: Proven Strategies Guaranteed to Succeed

Monday, July 22, 2024
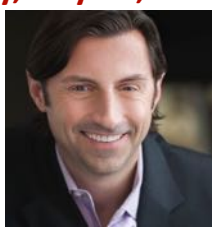
Gerry O'Brion presents

Maximizing Your Influence: Influencing Customers, Co-Workers and Employees to Say Yes to You

Monday, August 19, 2024

Keith Bailey presents

TrustWorking: Cultivating Connections Within Your Sphere Of Influence

Monday, September 16, 2024

Julie Holmes presents

UPGRADE Your Team: 7 Steps to Becoming an AI-Empowered Organization

Monday, October 14, 2024
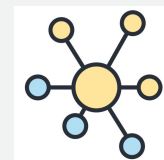
Ben Freeman presents

Primed, Connected, & Personalized: Master Connection Through Personalized Engagement

Monday, November 11, 2024

Greg Williams presents

Rise to Superhero Status: Mastering Vital Soft Skills for Exceptional Achievement

Monday, December 16, 2024

Stephanie Wachman presents

Wired to Connect: The Neuroscience of Communication and The Impact of Our Words

Information About This LEADERSHIP USA® Learning Event

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AGENDA
Registration starts at 8:00 AM. The workshop starts at 9:00 AM and concludes promptly at 12:00 PM. A fifteen-minute coffee break is scheduled for 10:30 AM. Breakfast is served from 8:00 to 9:00 AM. Restrooms are by the elevator door, as well as the 1st & 2nd floors.

MICROPHONES
This event is being livestreamed around the U.S., so please use the wireless microphones when speaking. Even if the live audience can hear you in the room, the remote audience can't unless you speak into the microphone. Thank you in advance!

PHONE CALLS
As a courtesy to others, please mute your phones during the program. If you must take a call, please take the elevator down to the first floor lobby. (We can hear your conversation if you stand by the restrooms.)

OUTSIDE WORK
Texting, working on your laptop, and responding to email can be a distraction to your fellow learners. Please be present during the event and work outside the meeting room.

REGISTRATION
The schedule of upcoming LEADERSHIP USA learning events is included in the front of this workbook. Register with a credit card online at LeadershipUSA.com/events or email Nadine@LeadershipUSA.com to receive an invoice.

FEEDBACK
To best meet your needs, we need your input! At the conclusion of the session, please complete the paper or online evaluation using the QR code or URL on the inside back cover.

CERTIFICATION
To receive 3 SHRM, and 3 HRCI credits for this event, please email your request to Nadine@LeadershipUSA.com.

Thank you and have a great day!

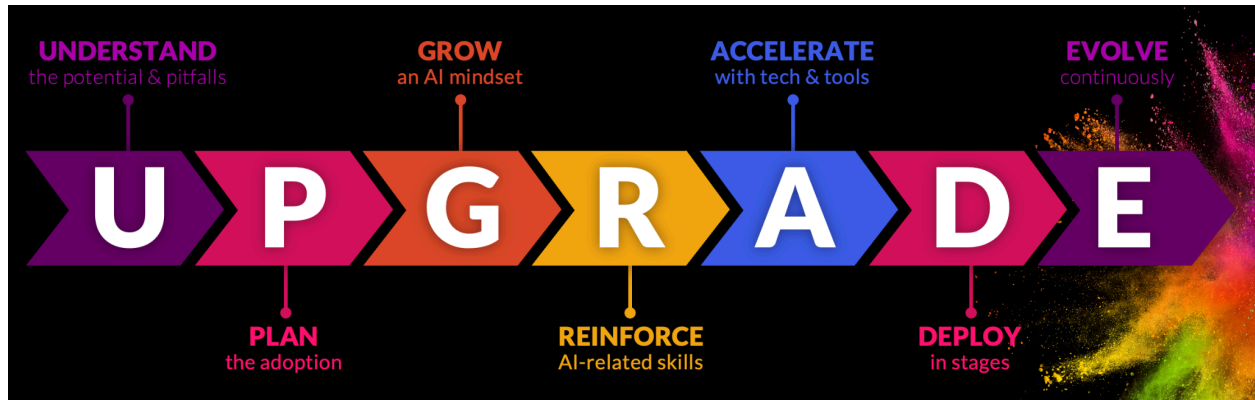# Bionic Business: Selling Smarter, Serving Better and Saving Time with AI

UPGRADE Yourself and Your Teams to Be AI-Empowered

UPGRADE: A Holistic Approach to Artificial Intelligence

We're at an inflection point. Artificial intelligence is rapidly weaving its way into the fabric of our world, transforming how we live, work, and interact.

As businesses increasingly adopt AI, it's essential to understand both its importance and how to implement it effectively. AI's role is not just about automation; it's about improving decision-making, fostering innovation, and enhancing the way businesses operate. However, to leverage AI effectively, a structured approach is necessary.

The UPGRADE framework provides a clear pathway for businesses and individuals to integrate AI into their operations.

Why AI Matters Now More Than Ever:

- **The Data Explosion:** We live in a data-driven world. Every interaction, transaction, and online activity generates a staggering amount of information. AI excels at analyzing vast datasets, uncovering hidden patterns and insights that can drive better business decisions.
- **Automation Unleashed:** Repetitive, time-consuming tasks are the bane of productivity. AI-powered automation can handle these tasks with speed and accuracy, freeing up human talent for higher-value, strategic work.
- **The Personalization Paradox:** Customers crave personalized experiences, but delivering those at scale can be challenging. AI enables businesses to

understand individual customer preferences, tailor interactions, and create hyper-relevant experiences that build loyalty.

- **Speed is the New Currency:** In the digital age, the ability to adapt and innovate rapidly is paramount. AI can accelerate product development cycles, optimize supply chains, and empower businesses to respond to market shifts with agility.

This isn't about more than "staying ahead of the curve" – it's about staying relevant. Businesses that embrace AI will be better equipped to:

- **Boost Productivity & Efficiency:** Automate routine tasks, streamline workflows, and optimize resource allocation for greater output.
- **Drive Innovation & Growth:** Uncover new opportunities, develop better products and services, and bring ideas to market faster.
- **Enhance Customer Experiences:** Create personalized journeys, deliver exceptional support, and foster deeper customer relationships.
- **Gain a Competitive Edge:** Stay ahead of the curve by leveraging AI-driven insights and automation to outperform the competition.

The UPGRADE Framework: Your Blueprint for Building an AI-Powered Organization

Navigating the world of AI can feel overwhelming, but it doesn't have to be. That's where the UPGRADE framework comes in. This practical, step-by-step guide will empower you to approach AI integration strategically, ethically, and with a focus on maximizing its potential within your organization.

UNDERSTAND AI's Potential and Pitfalls

The first step is gaining a clear understanding of AI, including what it can do and what limitations it has. This involves learning about AI's capabilities, the areas where it can be most effectively applied, and the ethical considerations that come with its use. Understanding these aspects is crucial for making informed decisions about AI adoption.

- **Knowledge is Power:** Start by demystifying AI. What is it, really? How does it work? What are its strengths and limitations? A clear understanding lays the foundation for informed decision-making.

- **Separate Hype from Reality:** The AI landscape is often filled with grand promises and buzzwords. Focus on practical applications that align with your specific business goals and challenges.

PLAN The Adoption and Integration of AI

Once there is a solid understanding of AI, the next step is planning its integration into the business. This involves identifying specific areas where AI can add value, such as in customer service, operations, or product development. A detailed plan should outline how AI will be implemented, the resources required, and the expected outcomes.

- **Identify Opportunities:** Not all business processes are created equal. Determine where AI can make the biggest impact by focusing on tasks that are:
    - **Repetitive & Rule-Based:** Data entry, invoice processing, basic customer service inquiries.
    - **Data-Intensive:** Market analysis, trend prediction, risk assessment.
    - **Prone to Human Error:** Tasks requiring high precision, consistency, or large volumes of data.
- **Develop a Phased Approach:** Start small, experiment, and scale gradually. Focus on quick wins that demonstrate value and build momentum for larger implementations.

GROW An AI-Empowered Mindset

Adopting AI requires a cultural shift within the organization. It's important to foster an AI mindset where employees are open to using AI and exploring its potential. This involves educating staff about AI and encouraging a positive attitude toward its use. Creating AI champions—individuals who lead AI initiatives—can also help drive this change.

- **Embrace Change as an Opportunity:** AI integration requires a shift in mindset. Encourage a culture of learning, experimentation, and a willingness to adapt to new ways of working.
- **Champion AI Literacy:** Invest in training and development to equip your team with the skills and knowledge needed to thrive in an AI-driven environment.

REINFORCE AI-Related Skills

To maximize the benefits of AI, employees need to develop the right skills - not just technical skills but also soft skills. Training programs should be implemented to

ensure that employees can work effectively with AI and make the most of its capabilities.

- **Communication is Key:** Effectively communicating with AI (through prompting) and interpreting its outputs requires clear thinking and precise language.
- **Critical Thinking is Essential:** Don't blindly trust AI; question its recommendations, analyze its outputs, and ensure ethical considerations are always at the forefront.
- **Grit and Adaptability are Non-Negotiable:** The field of AI is constantly evolving. Embrace continuous learning, be adaptable, and don't be afraid to experiment and iterate.

ACCELERATE AI-Empowerment with Technology and Tools

Choosing the right tools is essential for successful AI adoption. Businesses should carefully select AI platforms and technologies that align with their specific needs and goals. It's also important to ensure that employees are trained to use these tools effectively so the technology can be fully utilized.

- **The Right Tools for the Right Jobs:** The AI marketplace is vast and growing. Choose tools that align with your specific needs, budget, and technical expertise.
- **Seamless Integration:** Ensure AI tools integrate smoothly with your existing systems and workflows for optimal efficiency and data flow.

DEPLOY AI in Stages

Implementing AI can be overwhelming if attempted all at once. A staged deployment, starting with small projects that demonstrate quick wins, can help build confidence and momentum. As the organization gains experience and sees positive results, AI can be scaled up to larger, more comprehensive initiatives.

- **Iterative Implementation:** Start with pilot projects that allow you to test, learn, and fine-tune your approach before scaling to larger deployments.
- **Measure & Optimize:** Continuously track results, gather feedback, and adjust your strategy based on real-world data.

EVOLVE Continuously

AI is a rapidly evolving field, and businesses need to stay updated on the latest developments. Continuous learning and adaptation are key to maintaining a

successful AI strategy. Businesses should regularly review and refine their AI approaches, staying flexible and responsive to new opportunities and challenges.

- **Continuous Learning:** AI is not a one-time implementation; it's an ongoing journey. Stay informed about the latest advancements, attend industry events, and encourage your team to embrace a growth mindset.
- **Adapt and Thrive:** The future of work will be shaped by those who can effectively collaborate with AI, using it as a tool to augment their own capabilities and reach new heights.

The UPGRADE framework provides a roadmap for navigating the AI revolution with confidence. Throughout this workbook, we'll delve deeper into each step, providing practical exercises, real-world examples, and actionable strategies to help you build an AI-powered organization that's ready to thrive in the age of intelligent automation.

ACTIVITY 1: ENVISION THE FUTURE

This activity is designed to help you envision the transformative potential of AI in your daily operations. In the table below, you'll find a list of common business functions. Take a moment to reflect on how these functions are currently managed within your professional world. Then, imagine how AI could be incorporated to enhance, optimize, or transform these processes in the future as it becomes increasingly integrated into our workflows.

Business Area	Today's Experience	AI-Enhanced Experience
Prospect & Customer Communication		
Marketing Campaigns & Content Creation		
Speed to Product (Design to Delivery)		
Speed of Service		
Human Capital Management		

Strategy,
Analysis &
Decision-Making

Fraud Detection
& Security

Productivity &
Task Automation

THE INTERN APPROACH TO AI

When using generative AI tools like ChatGPT, it's useful to approach them as you would an intern—someone eager to assist but needing proper guidance, context, and oversight to perform effectively. This INTERN approach highlights the steps you should take to ensure that AI serves as a productive and reliable part of your workflow. Here's how you can apply this approach:

1. Reset Expectations

Much like with a new intern, it's crucial to reset your expectations when working with AI. While AI can handle a wide range of tasks, it's not infallible and often requires clear, detailed instructions. Understanding that AI might need multiple attempts to get it right sets a realistic baseline for collaboration.

2. Choose Wisely

Not every task is suitable for an intern—or for AI. Select tasks that play to the strengths of AI, such as data analysis, content generation, or pattern recognition. For tasks that require deep expertise, nuanced judgment, or creativity, your direct involvement might be more appropriate.

3. Provide More Training

In the context of AI, "training" refers to providing the AI with the necessary background information, context, and data specific to your business. This could include detailed descriptions of your products, services, target audience, or industry-specific terminology. The more context you give the AI, the better it can tailor its responses to meet your needs. Just as you would educate an intern on the specifics of your business, the same level of detail is required for AI to perform effectively.

4. Provide Lots of Guidance

AI, like an intern, performs best with detailed and clear instructions. The more specific you are in your prompts, the better the output. Think of it as giving an intern a task: if you want great results, you need to outline exactly what's expected, provide examples, and set clear boundaries.

5. Coach & Give Feedback

Review the AI's output carefully and provide feedback. If the results are not quite what you were hoping for, refine your instructions and ask the AI to try again. This process mirrors how you would coach an intern, offering constructive criticism and guidance to improve their work over time.

6. Beware of Know-It-Alls

AI can sometimes produce results with unwarranted confidence—much like an intern who might overstate their knowledge. Always verify the information provided by AI, particularly when it involves critical decisions or factual data. Treat AI outputs as a starting point that may need further validation or adjustment.

ACTIVITY 2: THE DO LISTS

The DO Lists

We all juggle multiple priorities. However, not all tasks are created equal, and how we manage them can significantly impact our productivity and growth. To better understand how AI can support us in managing these tasks, we'll be exploring a concept called the DO LISTS. This activity will help you categorize your tasks into three distinct lists: TO-DO, SHOULD-DO, and COULD-DO, and then identify how AI can take some of these tasks off your plate.

TO-DO List

The TO-DO list is where most of our daily activities reside. These are the tasks that keep us busy—answering emails, attending meetings, managing routine operations. While necessary, these tasks often feel like busy work. They tend to fill our days without necessarily moving the needle in significant ways. The TO-DO list is essential for maintaining the status quo, but it rarely excites or drives real progress.

☐	☐
☐	☐
☐	☐
☐	☐
☐	☐

SHOULD-DO List

Next is the SHOULD-DO list. This list contains all the tasks we know we should be doing to push our business forward—strategic planning, networking, professional development, and other growth-oriented activities. Unfortunately, these tasks often get pushed aside because we're consumed by our TO-DO list. The SHOULD-DO list is

where real progress happens, but only if we make the time and effort to address these tasks.

☐	☐
☐	☐
☐	☐
☐	☐
☐	☐

COULD-DO List

Finally, there's the COULD-DO list. This list is filled with aspirational tasks—projects and ideas that have the potential to transform our business, create new opportunities, and drive long-term growth. These are the tasks that could significantly increase our value and impact, but they often remain untouched due to a lack of time and resources. The COULD-DO list represents the investments that can pay off in big ways, but only if we find a way to act on them.

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Activity Objective

The purpose of this activity is twofold:

1. **Identify Opportunities for AI**: By categorizing your tasks into these three lists, you'll begin to see just how many opportunities there are for AI to assist you. Whether it's automating routine tasks on your TO DO list, freeing up time to tackle the SHOULD DO list, or even making it possible to finally get to those COULD DO projects, AI can be a powerful ally in managing your workload.

2. **Prioritize Tasks for AI Assistance**: Once you've listed out your tasks, the next step is to determine which of these can be delegated to AI. This exercise will help you start thinking strategically about how to use AI not just to get more done, but to focus your time and energy on the tasks that truly matter—the ones that drive growth and add value.

The Exercise

During the exercise, you'll be asked to write out your TO DO, SHOULD DO, and COULD DO lists. Take some time to reflect on what tasks belong in each category. Don't rush—this is an opportunity to take a step back and get a clear picture of where your time and energy are currently going and where they should be going.

Follow-Up Discussion

After completing your lists, have a discussion to explore which items can be tackled with AI. This discussion is not just about identifying tasks for automation; it's about understanding how AI can help you focus on the most impactful activities. By the end of this exercise, you'll have a clearer idea of how to leverage AI to not only manage your workload more effectively but also to make meaningful progress on the tasks that will drive your business forward.

YOU DO YOU: Using AI Wisely

In the world of AI, the real magic happens when technology and human expertise come together. That's the essence of the YOU DO YOU approach, a balanced strategy for maximizing the effectiveness of AI in your work. This approach emphasizes that while AI can handle a significant portion of the workload, human input remains crucial at both the beginning and the end of the process. Let's break down the YOU DO YOU approach into three key phases:

1. The First 20%: Your Contribution - Strategy, Tool Selection, and Prompt Creation

The first 20% is all about you. This is where your expertise, creativity, and strategic thinking come into play. It's your responsibility to:

- **Pick the Right Strategy:** Decide what you want to achieve with AI. Whether it's automating a task, generating creative content, or analyzing data, your strategic goals will guide the process.

- **Select the Right Tools:** With countless AI tools available, choosing the one that best fits your needs is crucial. Your understanding of the task and the tool's capabilities will determine the success of the AI's output.
- **Craft the Perfect Prompt:** The quality of AI's work depends heavily on how well you frame your request. A clear, detailed prompt is essential for getting relevant and accurate results.

This phase is about setting the stage. By investing time and thought into these initial steps, you provide AI with the best possible foundation to work from.

2. The Middle 60%: Let AI Do the Heavy Lifting

Once you've set the stage, it's time to let AI shine. During this phase, AI handles the bulk of the work, leveraging its computational power to execute the tasks you've outlined. This might include processing data, generating content, or running analyses—whatever the task, AI is equipped to handle it efficiently.

This phase represents the core of the AI's contribution. It's where you step back and allow the technology to do what it does best: work quickly, consistently, and on a scale that would be impossible to achieve manually.

3. The Final 20%: Your Review, Edit, and Polish

The last 20% brings the process full circle back to you. Here's where your expertise is needed again to:

- **Review and Validate:** Ensure that the AI's output meets your standards and aligns with your original goals. AI is powerful, but it lacks the human ability to fully understand nuances, context, and emotional tone.
- **Personalize:** Tailor the AI-generated content or analysis to fit the specific needs of your audience or project. This might involve adjusting the tone, adding personal insights, or refining details that the AI can't fully grasp.
- **Polish:** Add the final touches that make the output truly your own. Whether it's fine-tuning a piece of content, validating data, or ensuring compliance with brand standards, this phase is critical to making the AI's work ready for implementation.

The final phase is arguably the most important because it's where the work becomes truly effective and impactful. AI can get you 80% of the way there, but your input is what transforms that work from good to great.

ACTIVITY 3: PREPARED PROMPTING

Crafting effective AI prompts is an essential skill that can dramatically improve the quality and relevance of AI-generated outputs. To help you develop this skill, we'll be using the PREPARED framework. This activity is designed to guide you through creating an ideal prompt by filling in specific elements associated with each letter of the acronym.

As you work through this activity, you'll learn how to structure your prompts to maximize clarity, context, and precision. The goal is to empower you to communicate more effectively with AI, ensuring that the responses you receive are aligned with your expectations.

In the activity, fill in the blanks for each element of the PREPARED framework. This hands-on approach will help you build out an ideal AI prompt, setting you up for success in your AI interactions.

P - Persona
Define the role or expertise you want the AI to adopt. For example, if you need marketing advice, set the AI's persona as a "marketing analyst." This helps the AI generate responses that are relevant and in line with the expertise you require.

R - Request
Clearly state the task or action you want the AI to perform. A well-defined request ensures that the AI knows exactly what you need. For instance, instead of saying "I need help," specify, "Generate a list of blog topics on sustainable business practices."

E - Explain
Provide the necessary context or background information. This helps the AI understand the bigger picture and tailor its response accordingly. For example, explain that your business focuses on eco-friendly products if you're seeking marketing strategies in that domain.

P - Process

Outline the steps or structure you want the AI to follow in its response. This is particularly useful for complex tasks. For instance, you might instruct the AI to "First analyze customer feedback, then summarize key themes, and finally suggest improvements."

A - Aim

Clarify the end goal of your prompt. What are you hoping to achieve with the AI's response? Defining the aim helps the AI focus on delivering an output that meets your objectives, such as "The goal is to identify trends for our next product launch."

R - Restrictions

Set any boundaries or limits for the AI's response. This might include avoiding specific topics, adhering to a certain tone, or complying with industry regulations. For example, "Avoid mentioning competitors by name in the analysis."

E - Examples

Provide a model or example to guide the AI's response. This could be a sample text, a format outline, or a similar case study. Examples help the AI understand what you're looking for, ensuring the output is more aligned with your expectations.

D - Discuss

Be open to refining and iterating on the AI's response. The initial output might not be perfect, and that's okay. Engage in a back-and-forth to fine-tune the result until it meets your needs.

Describe the prompt that you are creating:

Write your prompt:

P (Persona)

R (Request)

E (Explain)

P (Process)

A (Aim)

R (Restrictions)

E (Examples)

D (Discuss)

NEXT STEPS

Taking the time to plan your next steps with AI is crucial to ensure that the technology delivers real value to your business. By following this structured approach, you're setting yourself up for a successful AI integration that drives efficiency, innovation, and growth. As you leave this session, use your AI action plan as a roadmap to guide your efforts and measure your progress. Remember, the journey with AI is ongoing, and each step forward brings you closer to unlocking its full potential.

This activity will help you outline a simple, actionable plan for integrating AI into your business or daily tasks. Use this guide to plan, prioritize, and track your next steps in leveraging AI effectively.

Identify AI Opportunities & Actions

Outline five key tasks where AI can make a difference in your business or daily operations. For each task, you'll identify the AI tool to use, who will be responsible, and set a goal date for completion.

Task

Tool

Who?   **When?**

Task

Tool

Who?   **When?**

Task

Tool

Who? **When?**

Task

Tool

Who? **When?**

Task

Tool

Who? **When?**

CLOSING THOUGHTS

Congratulations on taking the first steps toward integrating AI into your work. By outlining your tasks, selecting the right tools, and assigning responsibilities, you've set the stage for meaningful progress. Remember, AI is a powerful tool, but the key to its success lies in how you apply it. As you continue to implement your action plan, stay flexible and open to learning—AI is an evolving field, and your strategies may need to adapt over time.

If you ever need further assistance or guidance as you navigate your AI journey, don't hesitate to reach out. I'm here to support you every step of the way.

Julie Holmes

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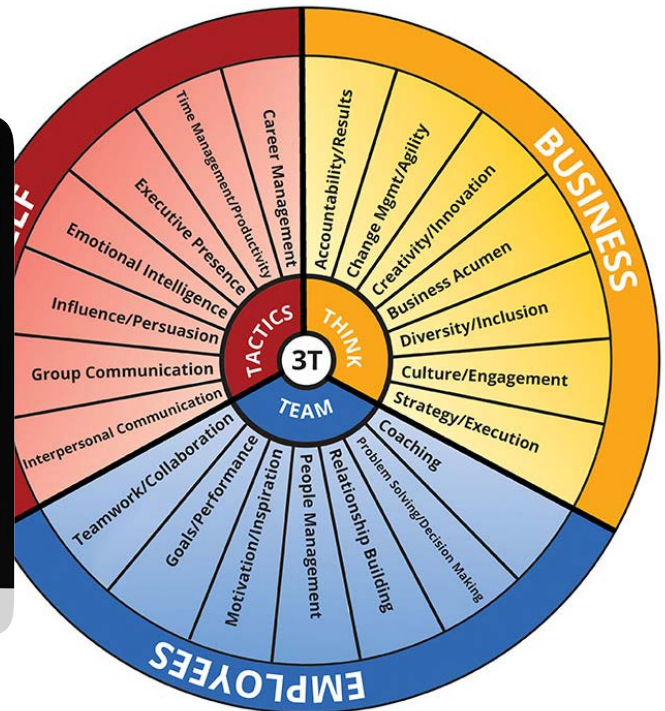
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Who Should Participate

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- Large Corporations with internal training departments who want to supplement their existing leadership development programs to "fill in the blanks" on performance improvement needs

- Larger Organizations that don't have internal training departments or an established leadership development program (who need an outsourced L&D function)

- Small-to-Medium Size Firms who need a consistent leadership development strategy for the senior leaders and managers in their organizations