

# Notebook LM Briefing Document

## Practical Use Cases for AI in Governance

12 March 2025

The briefing document comes directly from NotebookLM. The source document is the webinar transcript. I only did some minor editing to spell our names correctly.

### **Executive Summary:**

This webinar, titled "Practical Use Cases for AI in Governance," features Simon Fawkes, Alexie O'Brien, and Helen van Orton discussing the transformative potential of AI in governance, moving beyond efficiency to strategic enablement and creative innovation. The discussion highlights the importance of strategic alignment, focusing on specific use cases, managing risks (especially data privacy), and preparing organisations and boards through training and policy frameworks. A key takeaway is that AI is a tool to enhance, not replace, human intelligence and critical thinking, and requires a culture of curiosity and calculated risk-taking.

### **Key Themes & Ideas:**

#### **1. AI as a Strategic Enabler, Not Just Efficiency:**

- AI is presented as going beyond simple task automation to provide data-driven insights, risk prediction, and strategic thinking support.
- "AI supports strategic thinking. We all know that making the right call isn't easy. AI acts like an advisor, helping us test different scenarios and seeing the bigger picture."
- The speakers stress that AI must align with the overall business strategy: "Let's be real. Technology is great, but if it doesn't fit our strategy, it's just noise. AI should support our goals, not distract from them."

#### **2. Creativity and Innovation through AI:**

- AI can automate repetitive tasks, freeing up human capital for strategic thinking, collaborative problem-solving, and innovation.
- "By automating repetitive tasks, whether it's analysing data or coming up with that first draft board report organizations can really free up our brightest minds to focus on strategic thinking..." - Alexie O'Brien
- The webinar stresses that AI can foster transformative change, not just incremental improvements.

- Alexie O'Brien gives the example of chairing a private ancillary foundation and how AI can help create an impact report given to such diverse charities.

### 3. **Practical Use Cases: Assistant, Creator, and Strategist:**

- Helen van Orton presents a framework of three AI personas.
- *Assistant*: Automating tasks, summarising complex documents, explaining information to non-experts. Example: "If I've got a board meeting coming up and there's been some IFRS changes... I will actually get [AI] to say, hey, please explain this to me as a non-accountant..."
- *Creator*: Document creation (board charters, CEO onboarding plans), generating ideas, drafting board papers. Example: a company getting AI "to create the employee review" based on performance data.
- *Strategist*: Identifying emerging risks, providing different perspectives, and challenging biases. This involves "having a conversation with it and getting it to add value and come up with, hey. Well, what about this?"

### 4. **Navigating the AI Platform Landscape:**

- The rapid evolution and proliferation of AI platforms can be overwhelming. The advice is to "pick one and run with that. Don't get distracted by jumping from one to the other." - Simon Fawkes
- ChatGPT has the largest market share, but other options like Copilot (integrated into the Microsoft environment) and NotebookLM (from Google) are also highlighted.
- Copilot is noted as being safer, as it is already within most organisations' frameworks.

### 5. **Data Privacy and Security Concerns:**

- The speakers repeatedly emphasise the importance of data privacy and security when using AI tools, especially with sensitive corporate data.
- The panellists all stated that they don't load anybody's documents personally into, AI.
- "The most important thing we needed to get out there was what is our AI policy, make sure that we're not submitting data." - Helen Van Orton
- There is a strong recommendation to use paid versions of platforms where data usage for training purposes can be disabled, or to use tools like NotebookLM that only use uploaded data.

## 6. Addressing the ROI of AI Investments:

- Measuring the ROI of AI investments is a key challenge.
- Alexie O'Brien suggests tracking "how long would it take you to do a task before AI? And then how much time would it have taken you after AI converting that to a dollar figure..."
- Helen van Orton recommends starting with small, targeted AI projects with "AI evangelists" to demonstrate quick ROI and build momentum.

## 7. Importance of AI Policy and Framework:

- The webinar highlights the need for a clear AI policy to govern the use of AI within an organisation, addressing ethical considerations, data privacy, and acceptable use.
- An "AI policy framework for midsize companies" will be made available for download from BoardPro's website.
- It's crucial to "not just [have] there as a, piece of paper, but it's actually trained. And people understand it, and they can use it and what they shouldn't use it."

## 8. Addressing Skills Gaps and Upskilling:

- The panellists highlight the necessity of upskilling board members and employees to effectively utilise AI.
- "...conducting a, a skills gap, assessment across our board to really determine, you know, where our AI literacy and technical expertise might be lacking..." - Alexie O'Brien
- Training sessions and workshops can help "demystify AI" and ensure all board members can engage in AI-related strategic discussions.

## 9. Red Flags and Ethical Considerations:

- *Hallucinations* (AI making up information) is a major red flag. "Always, always, always check." - Helen van Orton
- *Shadow AI* (unregulated AI use within the organisation) is another concern.
- Ethical considerations and biases in AI models must be addressed.
- It is very important to be transparent about using AI and clearly explain what you're using it for, making sure that there's no bias.

## 10. Deep Research and Gemini 1.5 Pro:

- It can streamline research and you can get weeks' worth of work done in minutes.
- AI can analyse financial reports and market trends in minutes.
- AI can spot trends and red flags before they even become a crisis.

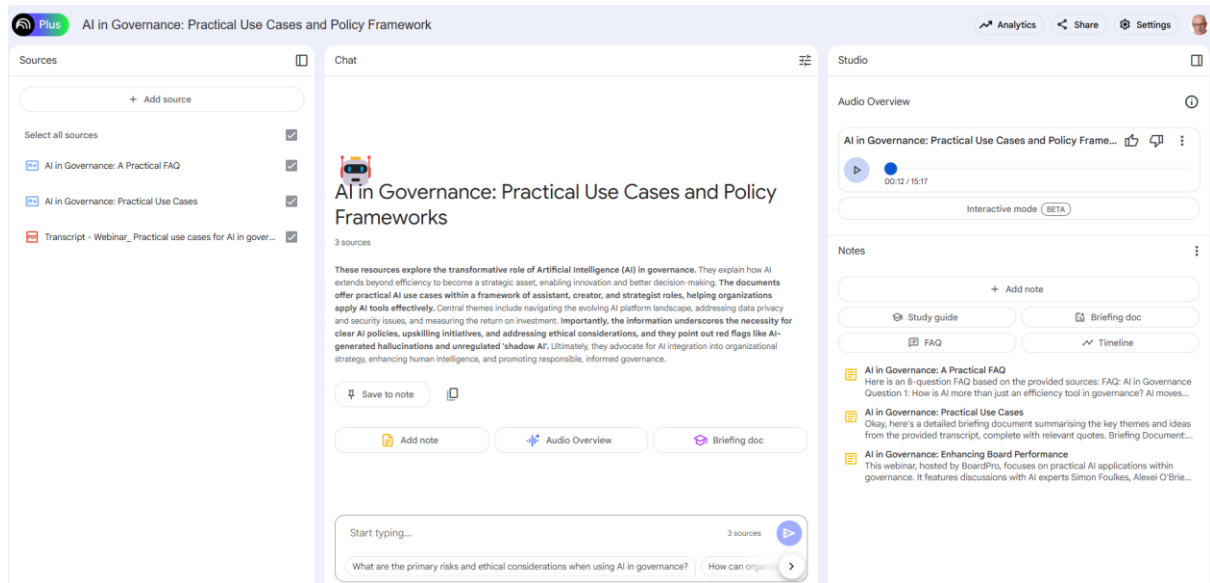
### Actionable Insights:

- **Develop a comprehensive AI policy:** Address data privacy, ethical considerations, and acceptable use guidelines.
- **Invest in AI training and education:** Upskill board members and employees to understand and utilise AI effectively.
- **Start with targeted AI projects:** Identify quick-win use cases to demonstrate the value of AI and build momentum.
- **Prioritise data security and privacy:** Implement measures to protect sensitive data when using AI tools.
- **Foster a culture of curiosity and critical thinking:** Encourage experimentation with AI while maintaining a focus on human oversight and ethical considerations.

### Conclusion:

The webinar provides a valuable overview of the potential of AI in governance. By understanding the key themes, actionable insights, and potential risks, organisations can strategically leverage AI to drive innovation, improve decision-making, and gain a competitive advantage. The importance of combining AI tools with critical human oversight is emphasized throughout.

# NotebookLM Screenshot



## Customise Audio Overview

*It is handy to save these instructions as NotebookLM does not save them.*

*The audio runs for 15 minutes, so my first instruction was ignored. Listening to the audio, I realised I forgot to explain that Alexie is a woman.*

- Keep this short: less than 10 minutes.
- Avoid jargon such as "deep dive"
- Concentrate on the main points.
- The target audience is people who attended the BoardPro webinar "Practical Use Cases for AI in Governance."
- The 3 presenters were Simon, Helen and Alexie. Alexie's name rhymes with Monday. Pronounce as "Alexay"

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