



Webinar Transcript – The AI Playbook: How to elevate your governance game

So hi, everybody. Welcome to our governance made easy webinar today titled the AI playbook, how to elevate your governance. Today, we are having a great discussion with our special guests, Helen Van Orton, Dauniika MacLean, and Joe Kelly.

My name is Sean McDonald, and I shall be your moderator for the next forty odd minutes.

Firstly, as always, thank you so much for attending. We always appreciate the effort you make to be here for our live events.

During the session, if you have any questions for the panel, please use the q and a button on the on your toolbar, and we'll be answering as many of these as we have time for for, during the session. And finally, if you stay through till the end, which, of course, we hope you will do and as is customary for our webinars, we have a special treat for you. By answering our really short one minute survey at the end of the webinar, you'll go into the draw to win our beautiful gift camper worth over four hundred dollars. And last week's winner was Sue Geel from Wellington Netball. So congratulations again, Sue, and thanks for leaving your feedback on our survey.

Now for those not too familiar with BoardPro, we are a board software provider sometimes called a board portal, And we serve of just around thirty thousand users in in about nine thirty nine different countries.

And we enable organizations to prepare for and run their board meetings more efficiently and effectively with less time and deliver more impact and value for the organization. And as much as we're a board software provider, part of our wider mission is to make the fundamentals of governance free and easy to implement for all organizations, especially those with resource constraints.

Now just sit back and relax.

We have an email coming through to you. It might be later on this afternoon. Failing that, it'll be first thing in the morning, and it'll include a copy of the slides, a recording, and, a copy of the transcript. So just relax and sit back, ask as many questions as you would like.

I'd like to now have, Helen, Dauniika, and Joe introduce themselves starting with, let me think. Oh, you're first on the list, Helen, so away you go.



Beautiful.

Everyone. I'm Helen Van Oaten. I'm a professional director and board chair across a number of organizations in New Zealand and in a range of different industry verticals.

I also run a couple of other companies, both of which heavily leverage AI. So I'm using it every single day, and I just am so obsessed with its transformative power for both my own organizations, but the organizations on which I'm on the board.

I'm the managing director of Directly, which is a consulting and training business where we actually empower boards and executives to lead with confidence in the AI area. So we offer training, insights, governance tools to help you take that complex technology and turn it into a strategic advantage.

We do essentials training, AI master classes. I do keynote speaking and various other things. My background, back in the day, I did part of my degree in computing, went away, did a whole career across a whole load of different things.

And then in my final exec role, Vodafone, I actually ended up, as part of that, having digital care and automation. So got heavily back into that world with digital humans and chatbots and RPAs.

And then, obviously, in my board career and in my consulting career, I'm using AI all of the time. So excited to share some of the insights with you.

Thanks, Helen. Dauniika, you.

Oh, kia ora koutou, everyone. I'm Dauniika McLean from board administration services.

I'm a certified company director and a company secretary.

I started my company back in two thousand eighteen offering, bespoke professional services to boards from minute taking through to, consulting and governance advice, taking what I've learned at an enterprise corporate level and bringing that down to the kind of SME, privately owned family business level.

Thanks, Dauniika. And Jo?

Well, I could probably just be brief here because Dauniika and I basically offer the same service.

So yeah. Board board secretary staff and, we've got a team of, eight of us. And, yeah, just like Dornika offer everything in the governance space from basics, minute taking, etcetera, through the policy reviews, charters, all that stuff.



Fantastic. Thanks, team. So back to you, Helen, or over to you to get things started.

Beautiful.

So we're starting here with, a quote from Mark Cuban, whom most of you will know, very wealthy guy.

If you don't know AI, you're gonna fail. Period. End of story. So it's a pretty profound sort of starter to come in at, but the speed with which AI is transforming organizations is huge. A lot of organizations are talking about it. Not many of them are yet deploying it really effectively, but the ones who are are starting to create a significant gap between themselves and their competitors.

There is a huge advantage to be taken, for those companies.

And I just wanna spend a bit of time today talking about the governance side of that because we're not gonna get into the deep deep detail of the technology and LLMs and all of that stuff. This is from as a board role, where can you actually really play into that space? Before we go on to this slide, I'm just gonna, ask Dauniika, what do you think the main reasons that board should start using AI would be?

I think, you just need to get on the train. Like, it's naive to have your head in the sand and ignore AI. It's such a fast moving, critical, advancement in technology.

You just you'd be crazy not to investigate the way that you could use it in the company for efficiencies and use it for yourself as a director.

You know, how how you can use it even in your own personal life, is just really important to be aware of what's out there.

Beautiful. And, Jo, what role do you think curiosity plays in embracing AI?

I think it drives individuals and organizations to, I guess, explore and understand and leverage the potential that is there.

There's a lot of time so time efficiency to be had in streamlining of tasks.

And that's not just in the governance realm. That's an everyday, which I'm sure you'll talk to Helen. But I think the I guess the disclaimer is that, generally, if the AI product is free, then you are the product. And to kinda make sense of that, Every they collect every piece of data. Right? And social media platforms are a good example of that. Facebook, Instagram, TikTok.



So it can assist with all your ethical and legal compliance, but you have to be curious enough to find out the, you know, the secure platforms, etcetera, that all work for you as a starting point. Yeah.

Yeah. I think that's a really good point, and there's a whole webinar that we could do around AI risk and making sure that you're managing it and ethics, etcetera.

Okay. But today, we're we're a little bit more talking about how we're using it in our day to day boardroom practice. So I'm just gonna talk a little bit.

So on the slide here, you've got a group of directors sitting around, looking at a dice on the table.

Those observant ones amongst you will notice that the dice has got a number five on every side.

Had a really interesting conversation with AI trying to get to a picture of a boardroom table with a dice that showed multiple faces.

Many, many attempts, we failed. So I came to the conclusion that, a, this is actually a really good reflection of the fact that AI doesn't always get it right.

It also is probably a good reflection of the fact that boards quite often have group sync, so we all see the same perspective.

And you'll notice that all of the board members are male. So, again, if you think about the training data that AI has, most of it is based on all of the historic imagery. It's got all the historic information. It's got from across the Internet, and that board diversity probably was not so much a thing.

So I did ask it to put in some females, and it put in a female secretary, so I went back to the original image because that just annoyed me. So why have we got a picture of a dice on the table? So I was speaking about AI at a conference in Queenstown two or three weeks ago. It's a tough life home to speak down there, I have to say.

And one of the other speakers was talking about how when you put a dice down on the table, you can see a certain element of the dice, but somebody sitting opposite you can actually see this part of the same dice, but something completely different. And as board members, when we're sitting around a boardroom table, so often, we've got slightly different perspectives. And if we've got a really good, well balanced board, we've got a lot of different perspectives. But there's always that underside of the dice that we can't see. And no matter how well we are trying to be our best selves when we're reading and reviewing



board papers or, actually, if you're an executive and you're putting together board papers, how do we make sure that we actually get different perspectives?

And so I just wanted, on this slide, to go a little bit about how you can get I a AI to become different personas.

I wanna just preface this and say, I am not suggesting that you put your board papers into chat GPT to get it to do review. Please don't do that. If you are within an organization, if you're on the exec team, you're putting your board papers together, and you're in a environment where you've got Copilot, that's fine. You've got all of the data there. It's secure. It's within your own environment. But as a board director, how do you actually look at things with a different lens, a different perspective?

How do you get AI to actually help you uncover hidden risks or be more innovative?

And the trick is to actually start using it to put on different hats. So if I just give an example, if you we've got a strategy day coming up, for one of the boards that I'm on in a few weeks' time, and there's a couple of things that we've been looking at, as major projects for investment. And, of course, you've got your financial perspective and you've got the competitive stress yeah, competitive perspective, etcetera.

But, actually, one of the things that I've been doing is saying to AI, okay. You are director GPT.

You are, a innovative director who really wants to take risks and grow the company really rapidly. What's your opinion of this project with a very generic project that we've talked about, and just sort of giving it a small amount of context about the organization, but not the name. But then, again, you can go out and you can ask it a different question. So, just asking that question, and Copilot is pretty secure for data protection because it's in your own managed environment at work.

You could get it to put a regulatory hat on. So look at this proposal from a regulator's perspective, and what are the issues or concerns that a regulator would have? Or from a customer perspective, what lens would they take? Or, again, the financial perspective. So there's a whole load of different views you can get ChatGPT to come up with or whatever, applaud, whichever one you're playing in, to actually start thinking about how you can basically gain more perspective, gain more innovation.

It actually is just a really great way of seeing things through different lenses. And if you think that, this is, kind of out there and no one's doing that with, GPTs yet, there's already a couple of, examples. So in Australia, we've got a lot of people on from Australia.



Aid, Alice is the, robo director at the Real Estate Institute in Australia, and she's already part of board meetings and adding value, and they're actually because of the environment, they're putting the board papers into that. And IHC up in Dubai have got Aidan, who's their robo director, and they're actually using that director to come up with challenges, thoughts because of the environment. They're putting an awful lot of information into it, and therefore, they're getting it to do strategic analysis in a much deeper level.

One other just thing sorry. I'm trying to watch the questions, and I'll come I'll come back to the questions just in a second.

But I've lost my train of thought, so I'll go to questions now.

If I can't figure out what this is in a dice, euro director, whatever it produces, still a combination worth of saying it's you are absolutely right. And one of the key things that we'll talk about, Jeremy, is the that we should use AI as a copilot, not on autopilot.

And it's so easy to get lazy because it it it does come across as really smart. Right? But we need to use hybrid AI, and hybrid AI is that blend of human intelligence and artificial intelligence and use that to get the best outcomes of both. If you go on to autopilot, you're suddenly not gonna be a very good, not gonna be having good conversations because it you can't get it to do your thinking for you. And whenever I ask it to create something for me, I'm like, yeah. That was quite good, but I need to add this and the nuances and that human centric thinking.

So Tell him we tell him we have a couple of questions on security.

I just thought I'd throw throw it out there to the team. Tony asks how secure is Copilot for data protection?

So Copilot will be sitting if if you're in your organization and you're in in a Copilot environment, then that is you've got all of your data in there. If you think you've got Microsoft Word, you've got Excel, you've got PowerPoint, so all of your company data is in there. And within that Teams environment, you've also got, you know, if you're SharePoint. So, Microsoft have actually, literally in the last five days, have announced that they are putting, an agent on top of SharePoint. So that's gonna be really cool and exciting, and I don't wanna go off on a tangent today and talk about that. But the opportunities for Agen to KI are going to be huge. And, again, today, we're trying to talk about governance, but secure is the answer as long as you've got your, company set up in a secure space.

So Bill Bill asks a question, what in your opinion is the best way to start as a novice board, for AI?



That is a great question.

Funny enough, I wrote an article about this on my website a couple of weeks ago, and I might share that with you, Sean, and you can, put it on the BoardPro website as well.

Just start. The biggest mistake people make with AI is they just don't get started. So for your own training and knowledge, just start literally ten minutes a day. Just go on and play and ask it a few questions, whether it's about, a strategy that you've got coming up.

Just give it a bit of context and say, hey. What do you think? And see what it says and get into conversations with the with it. One of my favorite uses for AI is I have the paid version, so I'm not training the model.

And I actually you can have a conversation with it. So when I'm on my way somewhere in the car, I'll be saying, hey. Can you just tell me about this book that I haven't had a chance to read, and I wanna know what the key insights are and how could I apply them in this context?

And and literally just have a conversation with it and start playing, and you'll very quickly realize you don't need to be this big techie engineer. There's no coding. If you can talk, you can use AI. And in a governance perspective, I would say the best thing to do is to get me and come and talk to your board, and I'll give you the sort of the one to one and a half hour overview of everything you need to do. Can't fit that into the next couple of minutes, I'm afraid. But that is that is a big piece of the AI training that I do for boards.

Thanks, Dauniika Dauniika and Joe, with your clients, where do you start? Where do you suggest they start? Jo, you first.

Honestly, I'm I would mirror a lot of what Helen has said.

So you need good controls and a good framework in place, and that includes, a secure system, confidentiality, and permission settings being correct for your whole organization.

Otherwise, you'll be somewhat vulnerable.

So, for example, chat gpt, the standard version, everything's collected as data and used.

Again, there are other more secure platforms, but it depends what you're, you know, what programs you're running, what you're trying to achieve, etcetera.

Helen might have more insight, potentially around the premium version of chat GPT and whether that's of use, but I haven't used it. I've used Copilot, which is a Microsoft add on.

I think, again, a key thing is teaching your AI system to better process, the information.



And it's, yeah, that's critically successful, I believe, in the medium to long term.

But, again, it doesn't you don't have to actually have coding ability to do that. You can just give it really clear instructions.

So I think AI at the moment is more described as machine learning rather than actual intelligence. And I think as time goes on, it's going to become more intelligent and able to, I don't know, solve our problems more swiftly.

I'm not sure I agree. I think it it's pretty intelligent. It it blows my mind, the stuff that it comes up with. And the the amount of different scenarios that I've used it in is just huge.

But absolutely making sure that you've got that, that security and thinking around that is really important.

Before we just move on to Dauniika's opinion on that, I just wanted to address a couple of questions. So, Susan, can it review an entire PowerPoint presentation and give suggestions?

Yes. I'll talk about one of my favorite tools later, which is Gamma, where you actually just say, I want a presentation on this, and within sixty seconds, it's created it from scratch, including all your slides, all your visuals, all your bullet points, and then you can just use AI to refine it. So that's pretty neat.

Grant, are some AI platforms better at not hallucinating?

NotebookLM is amazing.

It is my go to for all of my content creation because you just put sources into it, and it will only refer refer to the sources that you've given it.

So and you can click to say where's that coming from. So there's no hallucinating. It doesn't mean it gets it always right. You always need that human overview to just double check.

But, Notebook Allen is my favorite, and you can even put a whole load of information into it and get it to create a little podcast. So, again, when I'm doing board training, I'll do a demo, and I'll leave them with a podcast that they can listen to afterwards about their industry sector, that's been completely generated by AI. And just to give you an example, going back to that cleverness point, I zoom on for a wineries board last week, and it's even cute in how how it phrases it. So one of the AI, presenters on the podcast was saying, we're gonna uncork some insights. And I'm like, that's that's pretty cool. It's very clever. So yeah.

Anika, how about you?



Just adding to that, another great source is Consensus AI, which uses a database entirely made of, published research articles. You can go in and ask it questions, and it'll give you an answer, and it'll cite all of the articles and research based documents that it's referencing.

I think in terms of what you can do to start as a director, you should be, as a board, challenging management to see how they can leverage AI in the organization to bring inefficiencies.

And I think, personally, if you're starting out, just going and playing with it is the best place to start. So when I started, I went into chat GPT, and I got it to write poetry. And you can kind of play with it, and you can say, right. I want a limerick about a mathematician on a beach. And it's incredible, the creativity that it has. And it kind of just gives you an insight into what it's capable of, and you can then progress from there in terms of what you're asking for and what you can see it do.

Brilliant. Back to you, Helen.

Beautiful. I think, you're doing a great job on answering questions as we go there.

Sean, to there was somebody's question about Jeremy. No AI directors wouldn't have go voting rights, and, I I wouldn't be going there anytime soon. So I just wanna just quickly touch on AI as a director in this one.

So it really answers some of those questions we've had in the chat about what where does AI play and where do you play.

And on the next slide, we'll talk a little bit more about how you get AI to do a bit more how you behave a bit more how you want it to. But as a director, AI can uncover blind spots. It can help you frame questions. It can look at unintended consequences. It can challenge your thinking. It can you know, we all have our biases coming into things. It can help neutralize that bias.

That's great, but you've got a really important role to as to play as well. You're making sure I'm interpreting this. I'm deciding what we're actually doing. I'm balancing that perspective, which might be words on a page. It may not make any sense. It may make a lot of sense. And putting things into context, I'm using that human intelligence to combine with that AI to make sure we're getting the right outcomes.

And if you think about the role that AI can, all these questions about the different, apps, I've got a slide on those later so you'll be able to find all of those. So don't worry about them. I'll come back and cover all of them.



So, AI can play three different roles. It can be a strategist, it can be a creator, and it can be an assistant. And I think when you're first starting with AI, you very much use it as an assistant. So literally just helping you with some of those practical manual tasks.

And within your organization, there's gonna be a whole load of people using it as an assistant. So shadow AI is a real thing. So this is where you may have even put a ban in your organization or you've been silent in your organization about your guidelines for AI. Doesn't mean people aren't using it.

And one of the things you need to do early on as a director is actually understand where they can play, sorry, is understand where people are actually playing in the AI space. So if we just sort of talk on that one, Jo, how are you seeing AI uncover blind spots in terms of these types of different areas?

I think it is helping to do things that might take you a long time to do such as writing a policy.

You actually get all the templates in place, but you it it would take a really long time to go through all of that. And then also you've got some practical experience and some nuances of the organization you're working with.

And if you plug all of that with good instructions into, an appropriate system, you basically then it saves it's stream streamlined time. Right? Makes us more efficient.

Then we go through and obviously, it just said, then check it, check again for a few legal and ethical compliance elements, but otherwise, it just provides massive efficiencies.

In terms of actual blind spot, it often uncovers things that you didn't think about, which is great. And you can, you know, put your specific sources in as in this is a best practice governance code that, we want to work with, which is not necessarily New Zealand, in the deck code, and there are others. So you can you can really enhance things like policies, etcetera, all sorts of things.

Beautiful. Thank you. And, Dauniika, have you seen on this sort of area? Do you send me pitfalls where someone's relied a little bit too heavily on AI?

Yeah. There was, when it first came out, there was the case in the states of a, solicitor using AI to review all of the documentation and write basically the case that they took to court and hadn't hadn't checked it, hadn't since checked it and went to court using this information. And it was, it had made stuff up and made assumptions that weren't true. So I think that's the biggest pitfall is people not, you know, taking it as gospel and not actually using their brain to since check things and understand that it's it's not, it's not always gonna be accurate. I think, Joe Kreb wrote an article in the New Zealand Hero last week, and she



had a great analogy around, in navigation systems in the car, kind of saying, you know, Google Maps is incredible and it's changed our lives, but you wouldn't trust it to drive the car.

And I think that's the way that's a really good way I is trying to persuade you that you should, but, yeah.

Yeah. Beautiful. Okay. If we can jump onto the next slide, please, Sean.

Mhmm.

So this is, this I've I've seen this, different analogy about how you you treat AI to get the best out of it, but this is my favorite one. So it's you know when you get that newbie graduate and they are the most enthusiastic and eager to please and they're really smart, and sometimes they go out for a night on the town and they're a little dusty the next day, and they're not always doing quite what you want them to. You know, you wouldn't get a new grad to write a board paper and then just send it through to the board. And and to Dauniika's point just now, you're not going to just get AI to do something and then go with that. So the better the instructions that you give AI, the better the outputs. And then there is a whole craft around prompt engineering, which is actually part of the AI master class that we're running in February with BoardPro, which actually teaches you how to get the best out of AI.

But the more context you give it, the more detailed instructions to give it you give it, the more clarity around the output that you want from it, the better outputs that you are going to get. But, actually, that constant review, refining feedback, really important to keep doing that so you're getting the best outputs from it. And then that final point, it's gonna hallucinate. It's gonna make mistakes. So you always need to have that human oversight to make sure that you are delivering the best human blend of artificial intelligence. So yeah.

Jo, I just wanna as we're talking about ChatGPT or any other AI at the moment, what's your favorite use case of ChatGPT?

I would say it it's been a repetitive case, where for I mean, for board meetings in general, it can be useful.

But, with an AGM, I've found putting your all the relevant detail just as you've explained and Dominique, etcetera has elaborated on.

Putting your agenda in, putting your minutes from the last time, and giving some specific instructions.



You can do an entire AGM, etcetera. I mean, other documents as well, but you can produce an entire AGM's agenda, the draft minutes, again, just streamlining things.

But, again, you have to have the right protocols and knowledge in place and be able to you've you've always gotta edit it. It's never a perfect product.

But that that would be a really good example where we've saved a lot of time, clients.

That segues nicely into a couple of questions, Helen.

One that's come in from an anonymous.

Any thoughts of the role of AI in assisting with first draft of board minutes? This is a question that we get hundreds and hundreds of times.

Yes.

Yeah. It's it's a really interesting one. So my biggest comment about that is capturing the data. So, I mean, a lot of people use Otter dot ai. Teams has got an AI recording, capability.

None of the boards that I'm on are using it yet, but we're all talking about it. And I think our biggest concern isn't the fact that it can't capture the the the minutes in a first instance.

There would be a significant amount of nuance and human overlay that would take those minutes from being capturing the intent of the meeting to actually the what the board wanted to have captured because they're not always necessarily the same.

How do you know that it's secure is a really, really big question. And then in terms of discoverability, I think that's a really big issue for boards. So, you know, we if if it's discoverable, if it's the recording is available from that conversation that we have, if we end up in court over something that is an area that directors can be liable? Is that recording available, and is that something that we would necessarily want to be shared? So one of the boards that I'm on, we're just about to start using it, but we've had the conversation that there will be certain conversations where we will switch off the AI because we don't want that conversation recorded. Don't worry. We're not doing anything dodgy, but it's just, you know, some of the stuff that's got that that legal protection around it.

So it it's a challenging one. I'm still leaning away, but I'd be really interested to know what Jo and Dauniika, have of because they'll be using it in their roles, I'm sure.

I think our answer will probably be the same. So, Dauniika, take it away.

Like, yes. Absolutely.



But you need to be careful. You have to have guardrails in place.

I think you still need to be taking notes as a voice secretary in the meeting because you absolutely can't rely on it to give the right level of detail and nuance. It'll make suggestions that aren't relevant, and it'll exclude other information that is relevant.

You know, if you are recording, and transcribing, it often mishears people, especially here in New Zealand with our New Zealand accents.

But what can be useful is if you take your own notes and put it, you know, cleanse that there's no identifiable data, give it to AI and ask it to help summarize. That's a good starting point for for your minutes and certainly, drafting the minutes. If you're not using a portal like Word Pro and you're just using Word, it can put all of the agenda items in and kind of put the resolutions in and, give you a start up a team.

Yep. Yep. Yep. Sorry. I just also would add that totally along with their minds is that it let's give you a full transcript normally, which is obviously not that great to work with and then it gives you actions normally.

And then you can kind of tell. But, we we primarily use Otter dot ai, and I think Dornika does too.

But what it also does is allows you to go back to the recording for that specific part of the meeting with the transcript, and so you can relisten to it without having to scroll through, for example. But also a massive limitation is, like you said, Helen, that, a lot of boards don't want to be recorded. And so you also have to have really strict protocols around that, which Dornika and I have spoken about quite a lot.

You know, you've gotta delete the recording as soon as the minutes have been approved, for example, is a good practice and really delete it.

Mhmm.

Yeah. Just yeah. It's like that. Security.

With with Otter dot ai and Fireflies is the other one that I like to use.

They're all paid subscriptions. So they've got, like, a a kind of high level of, security is embedded in those paid subscriptions. We're not just Exactly.

Throwing things out.

Don't go for yeah.



Don't go for free stuff. No. Don't. Cost.

Yeah. Always pay.

Yeah. Nick, what are the typical costs involved in, a subscription for something like Fireflies and Otter?

I think it's about twenty five US dollars a month for a single use license.

I think it's worth forty ish NZ or something, doesn't it?

Yeah. You're extending it to your team, and I think you pay you scale it up. The price increases as you scale up, but for an individual user.

Back to you, Helen. Beautiful.

If we can go on to the next slide because I'm conscious that we've had a few questions about the different tools that, I used.

So, look, ChatGPT, or Claude, people have personal preferences, and I just couldn't fit all of them on the slide. So I should probably put it with a a one or the other. They're both really, really similar.

I use that every single day for a whole range of things.

And, you know, I'm trying to think what I've used it for this week. Okay.

In the last week, we've been putting together a different board and another strategy day. It's that time of year, unfortunately.

And I'm chair of the board, and so I was just trying to think, okay. What are the questions that I want the board to be thinking about?

What are the what's the competitive landscape looking like? So you can literally go onto it, and I'll actually, I'll show you a quick demo of that after I finish talking. And it you can get it to do a competitive analysis, and it won't be perfect, but it will be pretty good.

I said these are the sorts of areas that I want the board to be thinking about. Can you draft me an email, in that role as a creator to the board saying, think about these things. And it rather than me having to sit there and type out the whole thing, it wrote it, and it was ninety percent right. So I just had to go in and tweak it and change it and send it out. So really, really quick, useful.

I use it for everything every single day.



Again, a personal example. I had an MRI the other week, and I put these results into chat GPT and said, please explain what this means. Okay. Now explain it to me as I've called a ten year old because it came out with a whole load of medical jargon.

And then I was like, okay. I understand that now. Great. Thanks very much.

Gamma is the one that I use instead of PowerPoint, so I would never start a presentation from scratch now.

Gamma is amazing. You again, the better the prompt, the better the output.

But you can get it to write a report. You can get it to write create a PowerPoint on any topic under the sun. You can add slides. You you literally talk to it through AI, and it just creates it.

No. I don't like that picture. Can you change it? Or, actually, I don't like the layout and slide.

Can you make it into table forms? Again, it doesn't always get it right. I was doing something on strategic pillars the other day, and it it couldn't work out five. It would only do four side by side.

So, again, all of these tools are good. They're not great. They're not perfect. Please don't rely on them a hundred percent.

You know? They they come with warnings around them. Gamma is free. Yes. All of them are free, but, if you pay, you get better outcomes.

So Gamma, if you pay for it, you can save save the stuff without the gamma logo, and you get a lot more, volume to go through it. I think it's quite limited, the free plan.

NotebookLM.

So Notebook is, it's been around for a while, but this podcast thing I was talking about earlier has only been sort of quite a new piece. So Notebook is a rag model, and that basically means that it's grounded in the data that you give it. So you literally go, there's these fifteen research articles that I need to read in relation to whatever it is I'm doing or I'm writing a paper for the board on what's going on in the world. You give it those research articles and it will only look at those articles to create the outcome. So can it still hallucinate a little bit? But it is much, much more accurate because it is only it's not going off on this world's worldwide web search effectively or the the model, version of that. It is only looking at the papers that you've put into it, so you can get a much more tight and tailored response to your questions.



And then perplexity, I saw someone talking about that in the comments earlier. So, I mean, I don't ever use Google anymore or very, very rarely. I would go to chat GPT or to perplexity. And perplexity, is kinda like an AI powered Swiss army knife.

It just gives you all the answers around everything, and it quotes all the sources, and you can click and go back to the source article. My, counsel with that is you can go down a rabbit hole because it always suggests a whole load of other questions that you might want to think about, and you suddenly realize you've been half an hour in there.

And, yeah, yeah, you haven't come up again. So, just sort of moving on that, Dauniika, what AI tools are you oh, do you want me to do the demo quickly, Sean, and then I'll ask the questions?

No. No. No. Carry on.

Okay. Dauniika, what AI schools are you using in your wider practice to manage lyses?

I'm using Checkat GPT almost every day.

It's just it's so fantastic. You can give it personas.

For example, you can ask it to act as a registered nutritionist, and you can ask it a nutrition advice. It'll basically have a consultation with you, and provide meal plans and, you know, suggestions for ways that you can manage your health. That's just one very specific example.

Our kids use TutorMe, which is a GPT, issued by the Khan Academy, and it's feed all of the different curriculums.

So the Cambridge curriculum, for example, if you've got kids doing Cambridge, they can go in and they can ask questions about subjects, and it'll act as a tutor. So it doesn't give answers. It, it asks probing questions in return, and it challenges their own learning, which is it's absolutely fantastic.

I use a product called Motion to manage my calendar, which is really good to to Yes.

And upload your to do lists, basically. And it looks at your calendar and what you've got booked in, and then it slots in all of your tasks that you have to do throughout the day and basically acts as an executive assistant to say this is what you need to do by when. And, if your meetings change, it just automatically reshuffles things so you don't need to think about that. It does it for you. And it's, you know, similar to Calendly in that people can book appointments with you directly through a link that it provides, and it finds time to slot in for you.



I can keep going. There's lots out there, but I'm not just.

Okay. I'll just very quickly do a chat GPT. It's literally just a screen recording of a version of it that I was doing the other day. So, have you shared the screen to me?

So, this is I'm on the board of a winery company specialized in doing this. Please can you help me identify a set of main competitors in the local wine making industry? So it's gone in, and it's given a whole load of different wineries.

And you're like, okay. That's great.

And then, yeah, okay. Well, that's quite an interesting group, but what I want to do with this, I want a high level competitive analysis of these key players. I'm gonna go to their websites. I want you to find out all of this information about them, whether it's marketing strategies, strengths and weaknesses, user experience, how sustainable are they, etcetera, etcetera, etcetera.

And then it will literally go through in sixty seconds, and it will then create this table giving you that overview. So if you're doing a presentation to your board and you've got to, put a competitor analysis in place, you'll wanna go back and you'll want to check that this is right, but that saves an awful, awful, awful lot of legwork.

And the comment I was making earlier about shadow AI, people are using this in marketing. They are using it in research. They are using it just about everywhere.

And, hopefully, that's come back to us.

And if you haven't got policies around it and you know, you don't know that they're doing they're not gonna be telling you. They're not gonna be telling you that they've saved thirty percent of their time, and they're now just sitting on TikTok for the rest of that day.

Or maybe you're just giving them so much work. It's their way of coping. But yeah.

TAC TBT is incredibly powerful and really, really helpful. Do you wanna just pop on to the final slide, Sean? Because then I can, just ask, Jo.

Yes.

What AI tool have you found most valuable? Because we just didn't get to that.

So I have found Otter AI the most valuable, our team handles. And that's because minute taking is quite a big portion of time often or it can be.

So like I said before, you can scroll back to the parts of the transcription, etcetera.



For example, we work for the district council, and their minutes have been in the past a hundred and fifty pages.

Many, many resolutions has to capture each councilor's vote, etcetera. And because it's all public, why not use AI? Right? So, it has been an an epic time saver in that client in particular.

Yeah. I guess I'd I'd just also like to just make that comment on your last slide that, you know, it can it can produce. So for a board report would be a good example of what your chat JBT example produced.

You can't there's always nuance to business and, you know, unless you spend forever giving it really specific instructions and then still it's not gonna Yeah. You want you want to also be a human and actually have some input into the process.

Exactly.

So you I feel like it's either a really good starting point or it's a really good testing point at the end where you find different things that you might not have thought of. So, yeah, there's always limitations. Right?

Beautiful. Thank you and agree. So I'm just gonna super quickly summarize, key things you can use AI for as a director.

Rolling the dice, giving yourself new perspectives, Use it. Treat it like a new hire. Don't trust everything it says. Be slightly cynical and be careful when you're using it, and make sure you're not training the model. Pay for it.

And, you know, I think Dauniika said it earlier. Explore, play, spend ten minutes a day just doing different things. If you wanna know more, there's an AI master class in February.

Training for boards, there's a whole lot of stuff that, you can get or come to directly and we can help.

These guys are amazing in terms of the company secretary's support that they can offer. And at that moment, I think I'd better hand it over to you, Sean. Thank you.

Feel free to connect with, our presenters today, everybody. Joe, Dauniika, and Helen on LinkedIn. I'm sure they'll appreciate your connection.

We have a whole range of fantastic topics leading up to the nineteenth of, December as far as our free webinars are concerned. So have a look on our website for all of those.



You'll receive an email from me now. It'll be later on today, which will include a video of today's webinar, including the presentation slides as well and also a copy of the transcript so you can get all of that great detail.

So just as you leave the webinar, don't forget to finish or complete our one minute survey. It's really short to go into the draw to win our gift hamper.

I'll announce the winner for that later on this afternoon. So thanks again for your attendance, everybody. I hope you enjoyed the session with Helen, Dauniika, and Joe. We look forward to seeing you at our next webinar, everybody. So have a fantastic day.