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DAY 2: AI FOR PROFESSIONALS - STUDENT HANDOUT
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TWO NEW TECHNOLOGIES AND FRAMING AI IN YOUR ORGANIZATION
Professor Mark Price | University of St. Thomas | January 2026

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DAY 2 LEARNING OUTCOMES
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By end of today, you will:
✓ Master NotebookLM & ChatGPT Deep Research for executive decision-making
✓ Extract competitor insights and prioritize actions
✓ Integrate AI into strategic planning
✓ Develop high-impact AI use cases with ROI
✓ Design responsible AI adoption with governance (EU AI Act 2026 compliant)

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PART 1: NOTEBOOKLM - YOUR RESEARCH ASSISTANT
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WHAT IS NOTEBOOKLM?
Google's AI-powered research assistant. Upload documents, get instant insights.

🆕 NEW FEATURES (Late 2025):
• Deep Research (December 2025): Extended research sessions
• YouTube URL Support: Analyze webinars, earnings calls, presentations
• NotebookLM Business: Enterprise features
• Enhanced Google Drive Integration

5 USE CASES FOR YOUR WORKDAY:
1. Analyze competitor whitepapers and strategy docs
2. Prepare leadership briefings from long documents (100-page reports →
   1-page summary)
3. Extract risks/insights from internal project plans
4. Combine multiple perspectives for stakeholder reports
5. 🆕 Analyze competitor YouTube content (paste URL)

QUICK START:
1. Go to notebooklm.google.com
2. Upload 2-3 documents (PDFs, reports, or paste YouTube URLs)
3. Ask: "What are the top 3 strategic priorities?" or "Create executive summary"
4. Get instant synthesis across all sources

PRO TIP: For competitive intelligence, upload 2-3 competitor annual reports,
ask "Compare their strategies and identify gaps we could exploit."

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PART 2: CHATGPT DEEP RESEARCH - BEYOND GOOGLE
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WHAT IS DEEP RESEARCH?
ChatGPT's extended research mode: 5-45 minute deep dives with citations.

🆕 NEW FEATURES (Late 2025 - Early 2026):
• Deep Research V2: Up to 45-minute sessions
• Canvas Integration: Edit reports inline
• Memory Feature: Context across sessions
• ChatGPT Search: Real-time web data
• Team Collaboration: Share research projects

HOW TO USE:
1. In ChatGPT, select "Deep Research" mode
2. Enter research question: "Analyze AI adoption trends in healthcare 2025"

3. ChatGPT researches for 5-45 minutes (you can leave and come back)
4. Returns comprehensive report with citations
5. Use Canvas to edit and refine

3 WORKFLOW OPTIONS:
• Path 1: Deep Research → NotebookLM → Gamma (presentations)
• Path 2: Deep Research → Canvas → Export (quick iteration)
• Path 3: Deep Research + NotebookLM parallel → Synthesize (comprehensive)

BEST USE CASES:
• Competitive landscape analysis
• Market trends research
• Strategic planning inputs
• Due diligence on vendors/partners

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PART 3: AI AND STRATEGIC PLANNING
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AI-AUGMENTED STRATEGIC PLANNING FRAMEWORK:

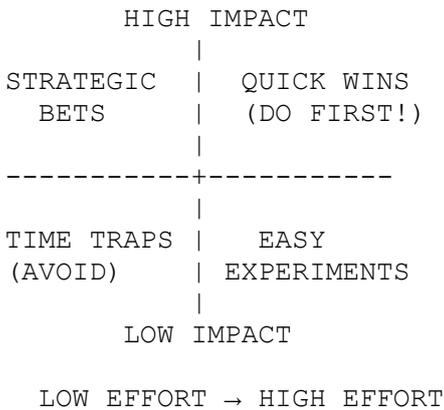| Strategic Element	How AI Helps
Vision & Goals	Trend forecasting from data feeds
Market Analysis	Synthesize competitive intel (NotebookLM)
Scenario Planning	Simulate best/worst-case outcomes
Monitoring	AI-powered KPIs, anomaly detection

MINI-CASE: Retail Margin Pressure
• AI Approach: Ingest POS + supply data; generate weekly forecasts; run 3 scenarios
• Outcome: 2.1pp margin lift, 15% fewer stockouts, weekly exec reviews
• Key: AI enables scenario testing that would take weeks manually

EXERCISE: Take your strategic plan. Where could AI help simulate trade-offs
you debate today? What data would you need?

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PART 4: PRIORITIZING AI USE CASES
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IMPACT-EFFORT MATRIX (2x2):

          HIGH IMPACT
               |
   STRATEGIC | QUICK WINS
     BETS | (DO FIRST!)
               |
   -----------+-----------
               |
   TIME TRAPS | EASY
    (AVOID) | EXPERIMENTS
               |
          LOW IMPACT

     LOW EFFORT → HIGH EFFORT

HOW TO SCORE:
Impact (1-5): Revenue potential, cost reduction, customer satisfaction,
strategic alignment
Effort (1-5): Technical complexity, data needs, resources, timeline
Priority = (Impact × 2) - Effort

Example: Customer churn prediction
Impact: 4 (high revenue protection) → 8 points
Effort: 3 (moderate data needs) → -3 points
Priority: 5 (Good candidate!)

FOCUS ON QUICK WINS FIRST: High impact, low effort. Build momentum.

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PART 5: AI GOVERNANCE & COMPLIANCE [NEW] (CRITICAL 2026 UPDATE)
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EU EU AI ACT (Effective February 2026):
• Prohibited practices: In effect December 2025
• High-risk AI: Requirements NOW MANDATORY
• Fines: Up to €35M or 7% global revenue
• First enforcement actions: Q1-Q2 2026

US U.S. REGULATIONS:
• Colorado AI Act (SB 24-205): EFFECTIVE FEBRUARY 2026 [NEW]
• NYC AI in Employment Law: EXPANDED January 2026
• Other states: Texas, Washington, Illinois considering legislation

AI GOVERNANCE CHECKLIST:

CORE GOVERNANCE:
☐ Purpose & scope defined
☐ Data privacy/retention rules
☐ Fairness checks & bias testing
☐ Explainability requirement
☐ Human-in-the-loop decisions
☐ Monitoring: drift, performance, incidents
☐ Accountable owners designated

[NEW] REGULATORY COMPLIANCE (2026):
☐ Regulatory compliance: EU AI Act, state laws
☐ Impact assessment for high-risk AI
☐ Consumer rights: disclosure, opt-out, appeal
☐ Documentation and audit trails

WHY THIS MATTERS NOW: Compliance is mandatory. Fines are real. Enforcement
has begun.

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PART 6: USER STORY DEVELOPMENT
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USER STORY TEMPLATE:
"As a [role], I want [capability], so that [business outcome]."

EXAMPLE:
As a Customer Service Director, I want an AI chatbot handling Tier-1 inquiries,
so that we reduce response time from 24 hours to <2 hours while freeing our
team for complex issues.

COMPLETE USER STORY INCLUDES:

ACCEPTANCE CRITERIA:
• Chatbot resolves 60% of Tier-1 inquiries without human
• Average response time <2 hours
• CSAT maintains 4.0/5.0+

SUCCESS METRICS:
• Baseline: 24-hour response, 72% CSAT
• Target: 2-hour response, 75% CSAT
• Measure after 3 months

ROI ESTIMATE:
- Implementation: $80K (platform + 3 months setup)
- Annual savings: $180K (labor reallocation)
- Annual benefit: $280K (savings + retention)
- ROI: 250% Year 1, Payback: 5.3 months

DATA NEEDED:
- Historical support tickets (18 months)
- Customer interaction logs
- Product documentation

ETHICAL CONSIDERATIONS:
- Privacy: Customer data encrypted
- Bias: Test across segments, monitor fairness
- Transparency: Customers know it's AI
- Human escalation: Clear path when needed

EXERCISE: Develop 3 user stories for your organization using this template.

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PART 7: JOBS.GPT - ASSESS YOUR JOB'S AI EXPOSURE
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WHAT: AI tool analyzing automation potential of your job using OpenAI's
exposure framework (E0-E11 scale)

HOW TO USE:
1. Visit https://smarterx.ai/jobsgpt
2. Enter job title and description
3. Review exposure analysis
4. Identify tasks for AI augmentation
5. Plan skill development

EXPOSURE KEY:
- E0-E3: Low exposure (AI limited help)
- E4-E6: Medium exposure (AI significantly assists)
- E7: High exposure (AI can largely automate)
- E8-E11: Near-future exposure (advanced AI will automate)

KEY INSIGHT: Focus on developing skills in LOW exposure areas (human judgment,
creativity, complex problem-solving, relationships)

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PART 8: CHANGE MANAGEMENT
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KEY CHANGE MANAGEMENT COMPONENTS:
1. Clear vision articulation
2. Leadership engagement (executive sponsorship)
3. Proven use case development
4. Training and support

TECHNOLOGY ADOPTION CURVE:
- Innovators (2.5%): Risk-takers, first to try
- Early Adopters (13.5%): Opinion leaders, influence others ← FOCUS HERE
- Early Majority (34%): Need proof, want references
- Late Majority (34%): Skeptical, adopt when necessary
- Laggards (16%): Resist change

STRATEGY: Focus on Early Adopters first. They create momentum and influence
the Early Majority.

ADDRESSING RESISTANCE:

"AI will replace my job" → "AI augments. Handles routine so you focus on

high-value work."
"I don't understand it" → "You don't need to be technical. Training provided."
"This is just a fad" → "AI adoption accelerating. Staying competitive."

CORE TEAM STRUCTURE:
• Executive Sponsor: Unblock decisions, own narrative
• Product Owner: Requirements, priorities
• Data Lead: Data strategy, quality
• Domain SME: Business expertise
• Risk/Compliance Lead: Governance
• IT Lead: Technical architecture
• Change Lead: Communication, training

CADENCE: Weekly stand-ups, Monthly value reviews, Quarterly scale decisions

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PART 9: KPIs AND ROI MEASUREMENT
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KEY PERFORMANCE INDICATORS - WHAT TO TRACK:

PILOT SCORECARD EXAMPLE:

KPI	Baseline	Target	Current	Status	Owner
Cycle time (hrs)	10	7	8	Yellow	Ops Lead
CSAT (%)	82	90	85	Yellow	CX Lead
Cost per ticket	$7.50	$6.00	$6.40	Green	Sup Mgr

STATUS: Green (on track), Yellow (needs attention), Red (requires action)

ROI CALCULATION:
1. Calculate Costs: Implementation + ongoing (licenses, maintenance, staffing)
2. Identify Benefits: Cost savings + revenue benefits
3. Time to Value: How quickly do benefits materialize?
4. Calculate: ROI = (Total Benefits - Total Costs) / Total Costs × 100%

2025 INDUSTRY BENCHMARKS:

Metric	Benchmark (2025)	Source
Time-to-value	3-6 months (pilot)	Gartner 2025
Payback period	8-15 months	McKinsey 2025
Productivity lift	15-25% (automation)	BCG 2025
CSAT lift	5-12 points	Forrester 2025
Error reduction	30-60%	MIT 2025
Adoption rate	40-60% (year 1)	IDC 2025

USE BENCHMARKS TO: Set realistic targets, justify investment, track vs. peers

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PART 10: 30/60/90 ACTION PLAN
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Horizon	Decision	Action	Owner	Success Measure
30 days	Pilot go/no	Stand-up team	Sponsor	Charter signed
60 days	Scale criteria	Build MVP	PO + IT	+10% KPI movement
90 days	Scale/stop	Rollout plan	Sponsor+CFO	Payback on track

NEXT STEPS CHECKLIST:
☐ Identify 1-2 quick win use cases
☐ Schedule kickoff with core team
☐ Decision-makers to involve
☐ Required approvals
☐ Pilot testing plan and timeline

☐ 30/60/90 review dates

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AI ETHICS IN ACTION `NEW`
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REAL-WORLD LESSONS (2025-2026):

Theme	Risk	Mitigation	Recent Example
Privacy	Data misuse	Secure platforms	€20M fine (Dec 2025)
Bias	Discrimination	Diverse training	Hiring tool pulled
Transparency	Black-box decisions	Explainability layers	CO law requires
Labor	Job displacement	Upskilling programs	200 AI Operator jobs

KEY LESSON: Proactive governance prevents costly mistakes.

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KEY TAKEAWAYS
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✓ NEW TOOLS: NotebookLM + ChatGPT Deep Research = powerful research platform
✓ STRATEGIC: AI enhances planning through scenario simulation, competitive intel
✓ PRIORITIZATION: Use Impact-Effort Matrix for quick wins
✓ GOVERNANCE: EU AI Act + state laws = compliance mandatory in 2026
✓ USER STORIES: Well-defined stories with metrics drive success
✓ CHANGE: Focus on Early Adopters, address resistance proactively
✓ ROI: Track KPIs, benchmark against industry standards (8-15 month payback)

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RESOURCES
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TOOLS:
• NotebookLM: notebooklm.google.com
• ChatGPT: chat.openai.com
• Jobs.GPT: https://smarterx.ai/jobsgpt

REGULATORY:
• EU AI Act: ec.europa.eu/digital-strategy
• Colorado AI Act: leg.colorado.gov (SB 24-205)

PREVIEW DAY 3:
• ChatGPT in Excel: Automate data analysis
• Build ChatGPT Agents for monthly reports
• Save 240-480 hours/year on Excel work

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