

SMARTER THAN THE AVERAGE GUIDE

HBR Guide to

Generative AI for Teams

Collaborate in new ways
Enhance every meeting
Achieve better outcomes

By Gabriele Rosani and Elisa Farri

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HBR Guide to **Generative AI for Teams**

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What You'll Learn

The adoption of generative AI is now widespread, yet it is still typically used individually: one person, one screen, one task. Meanwhile, the most important work in organizations happens in collaborative settings. It's no wonder that so many companies are failing to see returns on their investment in AI.

But there's more to the story. Pioneering teams that understand how to collaborate using AI are already generating greater value than those who merely use the technology as a personal productivity tool. Your team can leverage the AI tools you are already using and see immediate results.

The *HBR Guide to Generative AI for Teams* offers the modern playbook for AI-enabled collaboration. With practical, applicable advice, plain-language takeaways, and prompts you can try in each chapter, the book will help you elevate group thinking, sharpen decisions, and unlock deeper alignment. Whether you are a team leader, you manage AI transformation initiatives, or you facilitate group work of any kind, this book will help you understand how to successfully embed AI in your team's work.

You'll learn how to:

- Explore the new dynamics that generative AI brings to collaboration

- Bring generative AI into any meeting, workshop, or session
- Run better brainstorms, business reviews, and retrospectives
- Leverage generative AI as a team member, not just a notetaker
- Cultivate a mindset of collaboration with AI
- Reach team outcomes that were impossible before generative AI
- Use collective judgment to avoid common pitfalls and traps
- Establish a new “humans + AI” way of working in teams

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Introduction

An increasing number of managers and leaders are adopting generative AI at work. Some use it as a productivity assistant for routine tasks, such as writing emails or summarizing documents. Others use it as a thought partner for complex work, reflecting on problems and pondering decisions.

In 2024, only 15% of managers were using generative AI daily. A little over a year later, a survey of 500 leaders (director level and above) across 16 countries, conducted by the Capgemini Research Institute, revealed that this percentage had grown to 49%.[1]

Yet even as individual adoption spreads, another gap is clearly emerging. The same survey showed that only 7% actively use gen AI in team activities such as meetings, sessions, or workshops.

We see this frequently in our work with a wide range of companies: When we ask managers why they haven't brought AI into meetings yet, we typically get two answers: "I never thought about it" or "I'd like to, but I don't know how." Even the most AI-savvy managers and leaders seem to struggle to integrate AI into their team activities beyond basic meeting recording and note-taking.

The slow adoption of generative AI for teams is not surprising, especially in light of the fact that an individual "human-AI collaboration" narrative has been dominant since the release of OpenAI's ChatGPT in

2022. Gen AI is frequently viewed as one to one—one person typing into a chat box, one machine providing answers.

We believe it's now time to add an "s" to the human side: "humans-AI collaboration." The shift emphasizes AI's potential to help teams reach better outcomes at a time when most work is inherently social and team-based.

This foundational mindset shift points to a new way of working where AI is not a passive tool in team-based settings, but an active contributor. When AI is embedded intentionally in the flow of team collaboration, it has the potential to enrich discussions, sharpen thinking, and unlock deeper alignment.

Imagine integrating AI into your next meeting, workshop, or session. It begins well before the meeting. In preparation, AI can help participants engage with the content through prompts (in other words, participants can interact and *talk with* the prereading or briefings) or assist in anticipating the meeting dynamics and potential objections that might be raised. During the meeting, AI can play the role of an expert, a coach, a challenger, or even as a stand-in for stakeholders who are not present. As the meeting is concluding, AI can engage each participant to help them reflect on the key takeaways and the implications of the agreed actions. Later, AI can facilitate the follow-up process, helping the team align on next steps and agree on a clear path forward.

Our research with dozens of teams shows that the benefits of humans-AI collaboration are real, in terms of both output quality and risk mitigation. Additional recent studies from the most authoritative business schools support these findings.[2] It's time to look beyond individual use of AI—one person, one screen, one task—and rethink how your teams can work better, faster, and smarter with generative AI.

What This Book Will Do for You

Over the past few years, we have been touring the globe interviewing AI pioneers as well as speaking with countless managers using the technology in their daily work. This book is the culmination of hundreds of conversations on how gen AI is transforming the way people work together.

The *HBR Guide to Generative AI for Teams* shows how to move from using generative AI individually to actively using it with others, transforming collaborative work. If you are a manager or a team lead, or if you run meetings of any kind, we wrote this book for you. You will also find it valuable if your work involves AI transformation or future-of-work initiatives.

Full of best practices, tips, and clear instructions derived from extensive research and experiments with dozens of teams in real-world scenarios, this guide will help you integrate AI into your teamwork with hands-on advice, ready-to-use prompts, and examples for an immersive learning experience. Each of these prompts is tool-agnostic and model-agnostic—they will work with any enterprise or personal gen AI tool.

The guide is organized into seven sections. All readers should start with section one, where we introduce the approach we will use throughout the rest of the book. When you have finished section one, return to the table of contents. There, you'll see that sections two through six each cover a broad domain of team activities: planning, decision-making, ideating, problem-solving, and reviewing. Section seven covers new types of team approaches that are emerging in the age of gen AI. You are free to jump to the team activity that interests you most or that most closely corresponds to the next meeting on your calendar.

Remember that this isn't a book to only read; it's a practical manual to enhance teamwork. As you flip through, you will often feel inspired to experiment with something new with generative AI in your next team session. Do it! We encourage you to put the guide down and try new approaches with your team members any time ideas and inspiration strike you.

The approaches in this book work with any large language model (LLM) you are already using, and they will continue to work as models are updated. Many businesses have already learned that higher-powered models don't automatically unlock business value. The real differentiator in the

coming years won't be who has access to the most advanced LLM; it will be who knows how to integrate AI into team-based work. It will be the teams that can use it to make better decisions and build the practices and capabilities that turn AI from a bolt-on tool into a true partner. Because this book focuses on those durable human skills and team behaviors, its relevance will endure even as the technology inevitably changes.

HOW WE USED AI TO DEVELOP THIS BOOK

It would have been ironic not to use AI while co-writing a book about team AI collaboration. We used gen AI primarily for three purposes:

1. **Enhance our teamwork.** We leveraged AI as an additional team member, acting as our sparring partner, questioning logic, highlighting blind spots, and pushing us to strengthen our arguments.

2. **Take the reader's perspective.** After drafting passages, we asked AI to step into the reader's shoes to evaluate clarity, relevance, and resonance. At times, it acted as a curious learner; at others, as a skeptical reader, helping us anticipate questions and refine explanations. AI's critical feedback helped us preempt potential objections while making the book more relatable for readers.

3. **Test prompts.** As a vendor-agnostic book, we behaved as end users and tested every prompt we provide in the book across several of the most widely used models (such as Microsoft's Copilot, OpenAI's ChatGPT, Anthropic's Claude, and Google's Gemini). We also ran simulations in which we asked AI to stand in for different types of users to help us see how well each prompt worked in different situations or contexts.

With this book, we hope you'll confidently position you and your team at the forefront of the generative AI transformation. And it's a chance to be a role model for the use of gen AI, inspiring your team, colleagues, and peers to follow in your footsteps. This is your opportunity to be among the pioneers who are embracing the next, more valuable wave of AI adoption.

SECTION ONE

Generative AI–Enabled Teams

The Essentials

CHAPTER 1

Going Beyond the Individual Use of Generative AI

Years after the launch of OpenAI's ChatGPT, an inflection point that sparked widespread awareness of generative AI, leaders' and managers' adoption is growing, but it is still largely limited to individual tasks.

Most managers are leveraging generative AI for their personal productivity such as document summarization, document editing or writing, and data analysis.[1] Typically, these activities take place in a one-to-one setting: individuals sitting at their desk, typing on their personal device, and interacting privately with AI. This experience happens in isolation, an interaction between one person and the machine.

Our research reveals a clear gap in AI's application to team-based activities such as workshops, project reviews, strategy sessions, and collaborative meetings. This gap matters: A significant portion of work is done with others, yet generative AI is still treated as a purely personal tool at the desk rather than a partner in the room. This chapter offers a quick overview of where AI adoption currently stands and sheds light on the untapped opportunity to unlock its transformative potential in teamwork.

The Foundational Wave: AI for Individual Tasks

At first, generative AI was adopted for individual tasks, spanning from executing basic daily activities (*Co-Pilot* mode) to engaging as a thought partner (*Co-Thinker*) helping in reflection, providing different perspectives, challenging assumptions, and even enhancing strategic thinking and leadership development.[2] As the following stories illustrate, individuals can collaborate with generative AI in both modes depending on the task at hand.

Generative AI as a Co-Pilot

Lucy is a manager of people and organization at a life sciences company in the United Kingdom. She uses gen AI to create first drafts: from job descriptions, to HR policies, to internal communications.

Laurent is an investor relations manager at a telco company in Canada. He uses gen AI for summarizing lengthy documents, such as analysts' reports and earnings call transcripts.

Aarav is head of strategy at a financial institution based in Singapore, who regularly uses generative AI to search for analogies from other industries. By asking how a certain strategic dilemma was solved in another industry, AI helps Aarav get inspirations.

Generative AI as a Co-Thinker

Mario is a project manager at a manufacturing plant in Europe, and he often must solve technical challenges.[3] Uncovering root causes of problems is a recurring yet complex task. Mario dialogues with gen AI to help him think through each problem. Whenever a new one arises, he fine-tunes and tests his prompt sequence.

Kim is a communications manager at a large consumer goods company in the United States. She has been using gen AI to weigh how different stakeholders might react to a communication. Kim engages in a two-way conversation asking gen AI to act as specific stakeholders and debate with her about the content of each draft.

Amy is a finance leader at a large technology company who needs to promote a change initiative that will transform her department from an internal service provider into a partner for business units. Amy has created a prompt that her colleagues can run individually to engage in a dialogue with AI about how to embrace the new mindset.

Don’t neglect individual interaction

Bringing AI to teams builds on the strengths individuals develop through their own AI use. If you have not yet explored generative AI in your individual work, we encourage you to start with our previous book, *HBR Guide to Generative AI for Managers*. Covering more than 35 managerial tasks, helping managers to use AI as their efficient assistant or as a thought partner, it provides a strong foundation to succeeding with the team-based interactions in this book.

THE 3CS FOR SUCCESSFUL INTERACTION WITH AI

Notwithstanding the task at hand, there are three ingredients you should always mix into your interaction with the gen AI model of your choice: context, conversation, and challenge.

Context. Providing relevant information is a prerequisite for a meaningful interaction with AI. Just as when you brief a colleague, you shouldn’t give vague instructions or limited contextual information. Instead, iteratively share detailed input, examples, and data to help AI contribute more accurately. Without the right context, AI-generated output will most likely be standard, leading you to fall into the conformity trap.

- **Try this:** “Ask me three clarifying questions about any missing information on the context you might need to improve your response.”

Conversation. Productive collaboration with AI happens through back-and-forth dialogue. When you treat AI as a thinking partner to co-create with—not a shortcut—you ask follow-up questions, elaborate on its suggestions, and share your opinions. Without contributing, you become a passive observer simply waiting for the output.

- **Try this:** “Engage with me in a dialogue about [*specify topic*] to [*specify goal*], asking questions and elaborating on my answers.”

Challenge. AI tends to be very pleasing and agree with your ideas (LLMs often exhibit sycophancy, that is, the tendency to agree with or reinforce your opinions). You can control this by asking AI to play the role of a challenger or stress-test your ideas by taking the perspective of your customer or competitor. Without challenge, your interactions risk turning into an echo chamber.

- **Try this:** “I want you to take the perspective or role of [*specify*] and give me your candid feedback on the weaknesses of my argument.”

Between the Waves: Team Opportunities Missed

A significant portion of today's work takes place in teams, through meetings, projects, workshops, and collaborative activities. Research suggests that managers spend an average of nearly 23 hours per week at such meetings.[4] Even worse, many of them are neither productive nor engaging.

HOW AI CAN HELP MITIGATE MEETING PAIN POINTS

According to recent studies, more than one-quarter (28%) of workplace meetings leave employees with lingering negative effects, such as reduced engagement and productivity.[a] The most common reasons include lack of a clear agenda or objectives (59%), poor time management (53%), lack of actionable outcomes or follow-up (48%), unequal (39%) or low (38%) participation, and ineffective facilitation (30%).

AI can help address many of these challenges. It can assist in crafting relevant agendas, suggesting discussion topics, and ensuring that objectives are clearly defined. During meetings, AI can help manage time, track participation, and summarize actionable outcomes. It can even elevate team discussion by raising overlooked points or simulating stakeholder perspectives, making meetings more engaging, productive, and inclusive.

a. Brent N. Reed et al., "The Hidden Toll of Meeting Hangovers," hbr.org, February 12, 2025, https://hbr.org/2025/02/the-hidden-toll-of-meeting-hangovers.

These issues are well known and familiar to most managers. The advent of generative AI holds significant promise for making team activities more efficient, productive, and engaging, yet as we covered earlier, only 7% of managers actively use AI in meetings. This indicates that, although managers are increasingly integrating AI into their personal work and decision-making, its use in team activities is still seen more as a future possibility than as a present reality.

The paradox of the AI-savvy leader

We were invited to a workshop on AI strategy, led by the company's head of AI; let's call him Marc.[5] The session brought together members of the organization's internal AI community to discuss the AI strategic priorities.

Everyone in the room was well versed in AI, and the day was filled with discussions, brainstorming, and planning. At the end of the workshop, Marc asked for our feedback. We responded with a simple question: “Did you notice that AI wasn’t in the room today?” Marc paused, surprised. “I hadn’t even thought about using AI in our teamwork,” he admitted. Marc isn’t alone. Reflecting on our feedback, Marc acknowledged that AI could have unlocked far more value before, during, and after the workshop. The barrier, however, wasn’t technical. It was the mindset. He admitted that using AI hadn’t even crossed his mind until after our question.

Again and again, we see even the most AI-savvy managers reverting to pre-AI practices and routines when they conduct team activities like daily stand-ups, brainstorming, offsites, or planning or strategy reviews. This isn’t merely a missed opportunity; it’s a systemic blind spot that reaches every corner of the organization. Teams are leaving value on the table, not only in productivity gains, but also in sharper thinking, deeper alignment, richer discussions, and better outcomes. Multiply this by the dozens of workshops, meetings, and collaborative activities happening across an organization, and the cost of inaction becomes clear. Until teamwork is reimagined with AI, the impact of this technology in the workplace will remain limited.

Why does this happen? Largely for three reasons: First, as we saw in Marc’s story, it often doesn’t occur to managers. Second, even when managers want to experiment in team settings, they lack guidance: There’s no proven playbook to help reinvent traditional team activities for the AI era. Third, the standard user interface of gen AI models available in most organizations is designed primarily for individual interactions. It does not come naturally to counter that design default by engaging with AI during team discussions. Those are all the reasons why we wrote this guide.

The Next Wave: AI for Team Activities

We are at the dawn of the new wave of AI adoption: embedding AI in team activities where humans collaborate to get work done together.

Throughout the guide we will refer to 20 *team activities* that can be improved with generative AI. By team activities we mean structured, collaborative engagements in which people work together toward a shared objective, from exploring ideas, to solving problems, to reviewing an

initiative's progress and making decisions. Typically, team activities are anchored around meetings, which most organizations consider the true unit of team-based work: the place where alignment and decisions happen, and where teams can either create value or lose it just as easily through inefficiencies. In this book, we encourage you to think more broadly than the meeting itself. AI can enhance all the work that surrounds it, spanning the full cycle of team collaboration: preparation (when the team plans or designs the activity), execution (when members work together, discuss, and make decisions); and follow-up (when insights or decisions are translated into action).

Stories of pioneers using AI in team activities

Drawing from pioneering cases and field research, including dozens of manager interviews, we identified early adopters who are experimenting with AI in team activities.[6] These innovators show that integrating AI into collaborative work is already feasible with today's available technology; it's not just a vision for the future.

Anna, the regional head of strategy at an automotive company, used generative AI to help her prepare for a strategy planning meeting. Her goal wasn't just to organize the session, but to elevate the quality of the team discussion. After the meeting, participants approached her to learn more about the innovative way the workshop was prepared with AI and to show appreciation for the facilitation guidelines and the framing questions that effectively steered the conversation. The participants' feedback was enthusiastic, to the point that it sparked the idea of systematizing this approach for future use.

John, an innovation manager at a retail company, is leading a project to develop a new service. In every team session, he brings his laptop and leverages AI as a methodological guide supporting the discussion, inspiring with analogies from other industries, identifying blind spots, and consolidating key insights throughout the meetings. During team brainstorming, he activates the mic, making the experience of interacting with AI more spontaneous and natural.

David, a project manager at an industrial company, is facilitating a workshop on identifying use cases for robotics. At the end of the workshop, he invites participants to engage in a brief self-reflection using this

predefined prompt directed to gen AI: “Help me reflect on a workshop I just attended by engaging with me in a dialogue about the most impactful messages and how I can apply them to my projects.” Each participant spent 10 minutes conversing with AI and then shared their insights with the whole group.

The stories of Anna, John, and David confirm that the potential of gen AI tools to elevate collaboration isn’t just theoretical. In our research observing more than 100 managers working in small groups of three or four people, what occurred was striking: Two-thirds of these managers reported that the quality of their output improved when they integrated AI into their team activities. A similar proportion noted that the typical risks associated with generative AI tools, such as too much trust, hallucinations, complacency, and excessive speed, were more effectively mitigated when using AI as a team compared to using AI alone.

We all have the opportunity to join the next wave. Now that we have uncovered the untapped potential of integrating generative AI into teamwork, we move to how AI can be leveraged practically in your next team activity.

CHAPTER 2

Bringing AI to Your Team Activities

There's a common misconception around the use of AI for teams. Most managers and leaders we interviewed see this in a simplistic way: "Oh, yes, we do use AI in our team meetings, mostly online. We activate meeting recording or transcription, and AI handles all the note-taking, generating summaries and minutes once the meeting ends. It saves us a lot of time." While this bolt-on use of AI can bring some productivity gains, it barely scratches the surface of AI's true potential before, during, and after team activities.

However, we also encountered some rare pioneers in our research who went much further in leveraging AI for teamwork. One head of legal at a multinational dairy and nutrition company has begun using generative AI live with her team during product launch review meetings. Beyond basic tasks such as summarization of lengthy documents, she prompts AI, asking clarifying questions about the latest regulatory changes and updates, as well as suggestions for questions or aspects to take a deep dive during the review. As she explained, "I bring AI into my team meetings, asking the same questions I would pose to a team member or expert." Another pioneer is the CFO at a U.S.-based technology company. During a workshop with his leadership team to define the department's mission statement, he brought AI into the group discussion. By using AI, the team was able to move quickly from scattered keywords to a cohesive, compelling statement, while also checking its alignment with the company's overall strategy. As

he explained, “In the past, exercises like this sometimes ended up as a kind of ‘Frankenstein statement’—a patchwork of keywords from sticky notes. AI helped create the glue much more easily and quickly, and it also helped us stress-test the coherence of the statement, taking the perspective of key stakeholders.”

While these pioneers used many different approaches, they had a common insight: To unlock the true impact of gen AI in meetings, it is essential to bring AI into the asynchronous preparation and follow-up phases as well. Teamwork does not only take place during the meeting itself. That’s why we focus this guide on generative AI for teams, not just generative AI for meetings.

Using gen AI for teams effectively means leveraging AI throughout the entire collaborative journey:

- **Before: Prompt the prep.** AI supports planning, organization, and the creation of materials that participants can engage with directly through tailored prompts.
- **During: Augment the meeting.** AI facilitates and contributes by taking on situational roles, acting as an expert or simulating stakeholder reactions.
- **After: Advance the follow-up.** AI helps with debriefing and documentation and can also coach participants to reflect on the implications and path forward.

Let’s explore each phase in turn.

Before

AI can be leveraged not just to support the organization and agenda planning, but also to produce materials and facilitation guides that stimulate deeper reflection, foster engagement, and elevate the quality of the team discussion.

To start, AI can help you shape the structure of the team session and draft a detailed agenda. Then it curates preparatory content and co-creates the preread material with you. You can share these materials with

participants along with interactive prompts that help them engage with the content easily, reflect on key messages, and formulate early ideas, laying the foundations for more focused and productive group discussions. Additionally, AI can support facilitation by developing templates, framing questions, and providing instructions for teamwork. It can recommend techniques such as round-robin sharing or having the leader speak last, ensuring that all participants contribute before senior voices shape the conversation. In terms of team dynamics, it helps anticipate potential conflicts, considers differing perspectives, and suggests potential tensions that might arise during the discussion, enabling a smoother and more productive collaborative process.

Before: Dos and don’ts

You can improve your preparation for your team session by being aware of the following dos and don’ts.[1]

Enhance prereads with AI. Encourage participants to actively engage with preparatory content using AI prompts, rather than relying on passive reading. It’s not enough to simply invite them to do so; you need to provide one or two ready-to-use prompts. Ideally, you should carefully craft the prompts to spark a dynamic, personalized, and two-way dialogue with AI as a Co-Thinker. For example, try this prompt, “Based on this document [*share or upload*], guide me through a three-step dialogue to extract insights, explore strategic questions, and reflect on implications. At the beginning, ask about my role and involvement in the meeting. Use this information to tailor your questions and input. After each step, ask for my feedback.”

Simulate team dynamics. Beyond content preparation, use AI to reflect on the different stakeholders, interests, and perspectives that will be in the room, anticipating the interpersonal and group dynamics that may emerge during the group discussion. Try this prompt, “I’m preparing to present a proposal on [*brief description*] to the following participants: [*list names*]. Based on their past interactions with me (from emails, chats, or meeting transcripts), help me reflect on how each participant is likely to respond and how their

perspectives may interact." Prompts like this one are particularly effective when your gen AI model is embedded in the enterprise suite, that is, it has access to information about participants and past group discussions.

Provide contextual nuances. When preparing with AI, remember to bring your unique context into the process. Otherwise, AI may default to a standard, superficial output. You know your culture, your team dynamics, and what made a valuable team collaboration in the past. When you infuse your lived experience, values, and nuances, the results of humans-AI collaboration become far more meaningful, not just for the organizer/facilitator, but also for everyone participating.

Don't prepare alone. AI speeds things up, but don't let that rush you into working in isolation. Take time to pause, reflect, and share your drafts with others, and when needed, validate with topic experts before distributing materials to all participants. This applies also to ready-to-use prompts you plan to share ahead of the session. Pressure-test them with colleagues, gather feedback, and fine-tune before you hit "send."

During

Beyond recording, note-taking, and summary, AI's higher potential lies in its ability to join the meeting and power the team discussion. Remember to interact with AI in dynamic, back-and-forth dialogue, much like a team member or facilitator, asking questions, offering feedback, and even identifying signs of groupthink. By taking different perspectives, listing overlooked ideas, and constructively challenging opinions, AI can elevate the quality of the conversation during the meeting.[2]

FOUR PRACTICAL WAYS TO BRING AI TO THE MEETING

There are various ways in which AI can be integrated into a meeting, depending on the gen AI model of choice available in your organization:

- When AI is *integrated in your virtual meeting platform* (like Microsoft Copilot in Teams and Gemini in Google Meet), you can activate note-taking and real-time summarization. In the chat side panel, you can interact with AI live.

- When AI offers specialized *agents*, such as a *Facilitator Agent* or *Knowledge Agent*, either prebuilt or custom developed for your organization, you can add them as virtual participants in the meeting and interact with them.[a]
- When AI *enhances traditional collaboration tools* like Microsoft Whiteboard, it also supports brainstorming sessions; for example, it can help cluster ideas and organize the output.
- When the *voice-to-text or voice-to-voice feature is enabled*, you can bring AI into hybrid or in-person meetings too. Anyone can speak directly into the microphone; AI captures all ideas and comments as an additional team member.

a. Dominic Preston, "Microsoft Is Filling Teams with AI Agents," *The Verge*, September 18, 2025, https://www.theverge.com/news/781278/microsoft-teams-copilot-ai-agents.

During the meeting, AI can take situational roles (for example, co-facilitator, expert, challenger, client, competitor, and many others) activated at specific moments to augment the team flow. For example, try this prompt: "We are currently at [explain the current stage of workshop discussion or activity]. Based on what we have discussed [*share summary or intermediate output*], we would like you (generative AI) to take on the role of [*specify*] and help us in [*specify goal or task*]. Please engage with us in a dialogue that reflects this role and helps us move forward."

You can adjust this prompt to best fit the various situations described here:

- When converging the team discussion, AI can assist by clustering and consolidating ideas, especially when a discussion begins to wander.
- When articulating business concepts, AI might take on the role of a *business model innovation expert* helping the team structure their concept.
- When critiquing ideas, AI can become an *expert* or *challenger* representing the other side of the argument.
- When pitching a concept, AI can act as a *storyteller* or a *communications coach* to craft a more compelling narrative, or as *jury member* to strengthen the concept's value proposition.

- And for drafting the next steps, it can support as a *planner*.

In addition to playing different situational roles as a team member at the table, AI can also augment the individual contribution to the team discussion. In many workshops, participants are invited to take a moment to think individually, generating ideas, reflecting on key topics, or jotting down thoughts before sharing with the group. The facilitator can encourage participants to interact with AI one-on-one as a thought partner, asking questions, exploring ideas, and structuring their self-reflections in real time. Take the example of a workshop where participants gather to identify use cases for a new technology. During the ideation phase, the facilitator asks each participant to take 10 minutes and prompt gen AI like this: “Engage with me in a step-by-step dialogue about how [*specify new technology*] could be applied in my area of work [*specify*]. First, help me identify key pain points or repetitive tasks in my area. Then help me explore how this new technology might address these challenges or create new opportunities. Finally, help me think about which ideas seem most promising and why.”

During: Dos and don’ts

You can improve your team discussion by being aware of the following dos and don’ts.[3]

Explain to AI who is at the table. As you’d do in a traditional setting, the first step is to introduce yourself and the other team members to AI. In this way, AI has the context for who is participating and what role each person has in the team discussion. Imagine a cross-functional team discussion; if AI knows who’s participating and their roles, it can better articulate and elaborate on each participant’s ideas and contributions. It can also solicit different domain perspectives, making sure everyone is contributing to the conversation.

Speak to the mic. In an engaging team discussion, people debate and talk to each other. Having to type on a keyboard might bring fatigue and friction to the team flow. As most models offer voice-to-text or voice-to-voice features, remember to activate the mic, thus making the experience more fluid and seamless.

Don’t experiment with large groups first. Embedding AI in a team discussion works best with small groups of three or four people. It’s indeed more practical to integrate AI in a team discussion with fewer members: Typically, one person in the team uses a single device to interact with the AI while the other members join the discussion. If you have more participants, consider projecting on a larger screen or splitting into sub-teams, each augmented by their own AI.

Don’t let the prompter dominate. The person interacting with AI on behalf of the team shouldn’t take over the session, either from a facilitation, process, or content perspective. This is particularly relevant when typing. Make sure everyone’s input is captured. How? By prompting AI to encourage active participation of all team members. Try this prompt: “Make sure that silent, quieter team members contribute to this discussion by asking open-ended questions like ‘Jordan, what perspective would you add to this conversation?’”

After

AI streamlines the production of minutes and documentation, capturing insights and summarizing main items and actions. Beyond that, it augments the team’s reflection on the implications of decisions and helps translate those reflections into a coherent path forward. For example, try this prompt: “Analyze the key decisions made during our last team session. Engage with us [*specify*] in a dialogue to help us reflect on the key implications for our function [*specify*]. Then identify and explain the most critical dependencies these decisions create for our team.”

AI can also help you gather feedback through surveys and by prompting retrospectives and learnings about team dynamics to have a better session next time. For example, try this prompt: “Engage with us [*specify*] in a dialogue to help us identify which moments were most and least productive in our meeting [*share meeting transcript*]. Find the most challenging moment, whether due to misalignment, lack of clarity, or a drop in engagement, and recommend one specific change that could be adopted in future meetings.”

After: Dos and don’ts

You can improve what happens after your meeting by being aware of the following dos and don’ts.

Prompt the reflection. Use AI to create personalized documentation, such as minutes accompanied by an interactive prompt, customized for each function or role. This helps them better engage with the content and think about the specific implications for their area.

Leverage contextual memory. Use the AI to retrieve not just information (for example, “What was the final decision?”) but also the surrounding context and rationale (for example, “Who suggested this idea, and what was the rationale behind it?”). This capability prevents crucial background details and the initial thought process from being lost post-meeting.

Don’t simply accept AI summaries. Human curation is key. Always check, contribute to, and enrich AI’s documentation and analysis with your personal touch. Use AI as a collaborator and enhancer, not a mere automated notetaker.

Don’t rely solely on the transcript for behavioral analysis. The transcript captures what was said, but it can miss nonverbal cues and social signals.[4] To accurately assess meeting dynamics and behaviors, combine transcript analysis with participant feedback or surveys that capture sentiment and perceived challenges.

AI offers exciting opportunities to enhance teamwork, but it requires discipline. As you start bringing AI into your team activities, we recommend you follow these guidelines:

Be intentional. Proactively ask, “What if we try using AI in this team activity? What do we expect to gain by using AI together?” These preliminary questions allow you to shift to an experimental mindset, challenging the status quo of how work is typically done in teams.

Define the AI integration mode. Before using AI in a group setting, think about how you want to use it and when. Your decision will depend on several key factors: the number of participants, the setting (in-person, hybrid, or virtual), the sensitivity of the topic, relevant time constraints, and technical limitations and requirements.

Follow rules and policies. Always ensure that AI use aligns with your company's policies and legal or ethical guidelines. This includes how data is handled, what tools or platforms are allowed, and any restrictions on sensitive information. Embedding AI in teamwork should enhance collaboration without compromising security, privacy, or compliance.

Think end to end. Don't limit AI to just the meeting itself. AI enhances the full life cycle of teamwork: before (in the preparation of materials and contents) and after (in the debriefing and alignment on path forward).

Interact with AI as a team member. Rather than being limited to only asking AI questions, try having a dialogue and engaging in a back-and-forth discussion, as you'd do with a team member. AI can offer new perspectives, providing examples and even playing situational roles.

Experiment with emerging agentic features. As technology evolves, explore new built-in or custom agents. Agents go beyond just producing text in response to your queries: They act and carry out tasks like doing research, producing reports, or running complex analyses on data and documents. Stay curious, try them out, and evaluate how and where they can add extra value to your team's collaboration.

HOW AI AGENTS CAN HELP

Some of the most popular gen AI models offer ready-to-use specialized AI agents that you can add and use directly for different purposes. Consider, for example, these options:

- **Researcher agent:** Gathers background information, relevant insights, and supporting materials to set the stage for informed discussions.

- **Analyst agent:** Analyzes key data, identifies trends, and provides analytical context and visual output to guide decision-making.
- **Facilitator agent:** Creates agendas, takes notes, keeps time, and sets action items.
- **Brainstorming agent:** Helps brainstorm ideas, plans creative workshops, and organizes innovation sessions.
- **Survey agent:** Creates surveys, and collects and analyzes feedback from participants to assess engagement, satisfaction, and areas for improvement.
- **Prompt-coach agent:** Helps craft and refine effective prompts. Generates new ideas, analyzes existing ones, and offers feedback, examples, and suggestions.

In addition to off-the-shelf AI agents, you can also create your own custom agents if your gen AI model allows you to do so. You can draw inspiration from the prompts included in this book when designing the instructions for your custom agent.

This line of thought begs the question: Will AI take over team activities entirely? We don't think so. Some team activities, such as strategy workshops, retrospective sessions, or steering committees, will always depend on human judgment, nuanced discussion, and alignment. Even if AI is already taking over routine tasks—such as preparing materials, handling follow-ups, or allowing you to sit out a meeting and catch up later via AI-generated summaries—the real potential isn't in replacing humans; rather, it lies in enhancing collaboration between humans and AI, enabling teams to think, decide, and create together in ways that weren't possible before.

CHAPTER 3

The Twin Benefits of Integrating AI into Teamwork

There are two distinct types of benefits when AI is used in teamwork. First, team-based AI leads to better outcomes and solutions. It helps groups produce higher-quality, more thoughtful results than when individuals work alone with AI. Second, using AI in teams reduces the risks associated with gen AI. Collaboration allows members to challenge outputs, validate data, and catch errors or biases that a single user might miss. Together, these twin benefits show that humans and AI working side by side create a level of insight, judgment, and reliability that neither could achieve separately.

Better Outcomes and Solutions in Your Team-Based Work

In our research for this book, we conducted qualitative field experiments, observing more than 100 managers working in small groups of three or four solving complex business problems. What emerged was striking: Two-thirds of managers reported higher-quality output and greater engagement when using AI in team-based settings.

The reason why these teams outperformed the others was the way in which they interacted with AI. They didn’t just use it as an assistant for note-taking, summarizing, or searching, but as an active team member

contributing to the discussion, bringing perspectives and overlooked ideas, and challenging the team's point of view.

When teams not only ask AI to execute mundane tasks for them but engage in a two-way dialogue, they co-create better outcomes and solutions with AI. They also benefit from higher social engagement: When AI joins team discussion, people are intrigued (that is, "What if . . . ? Let's see how AI responds to this . . . "), they experiment more ("Let's also try this . . . ") and proactively contribute to the crafting of prompts ("Why don't we rephrase it differently? Why don't we change the instructions . . . ?").

One manager commented, "When we bring AI in the room, its suggestions often spark a richer debate, triggering curiosity and follow-up questions, leveraging the mix of expertise in the team. The result? We might move a bit slower, but the conversation is smarter! Moreover, it's easier to challenge AI's ideas than a colleague's. There's no ego, no hierarchy, no personal agenda. This leads to more open, candid debate and encourages critical thinking that might not emerge as naturally in peer-to-peer exchange." These findings are in line with experiments conducted at Procter & Gamble: Researchers studied how generative AI reshapes collaboration.[1] They found that while individuals using AI were a bit faster but conformed to average results, teams using AI were significantly more likely to produce solutions in the highest 10% of quality.

BENEFITS OF USING AI IN TEAMWORK

Our research with managers explored outcomes when teams use gen AI together rather than individually. Five key benefits emerged:

- **Diversity of perspectives:** Each team member brings different questions and expertise to the conversation with AI. Interacting with AI as a group leads to richer conversation and wider perspectives than one-to-one dialogue.
- **Better reflection:** Groups tend to use AI more slowly than individuals. This leads to deeper thinking, additional perspectives, and a wider variety of follow-up questions.
- **More-intentional use:** Team use of AI forces reflection and alignment on objectives (that is, what we want to achieve) and usage (if and how AI can help us in our team activity).
- **Better wording of questions and prompts:** Using AI as a team led to improved clarity and effectiveness of prompts. Team members tended to spend

more time aligning on what to ask the AI rather than jumping ahead on their first idea.

- **More experimentation:** Teams are more likely to explore directions that individuals alone might not consider, sparking curious attitudes of “Let’s try this . . . ” or “What about this . . . ?” This collaborative experimentation helps generate richer insights.

Reduced Risk in Your Use of AI

Using AI individually implies that you alone are dealing with the potential risks of generative AI. Shifting to team-AI collaboration changes the game: Working together makes cross-checking, challenging, and validating AI’s output more effective.

In our experiments, two-thirds of managers reported that the typical risks associated with generative AI tools were more effectively mitigated compared to using AI individually. Reduced risks included better management of the trust trap, where overreliance fosters complacency; hallucinations, where fabricated facts are mistaken for truth; the conformity trap, where outputs default to bland, average thinking; and the speed trap, where rapid responses encourage hasty decisions.

Teams using AI improve collective sense-making. They catch errors that individuals might overlook and surface hidden biases through critical discussion supported by diverse perspectives. By consulting domain experts on the team, they can validate data or critically review areas where doubts arise due to knowledge gaps. Team-level judgment addresses critical elements of risk that policy or individual judgment alone may miss, helping uncover blind spots, errors, and biases.

COMMON GEN AI RISKS AND HOW USING AI IN TEAMWORK CAN MITIGATE THEM

When generative AI is used in isolation, you may fall into typical traps. Used collaboratively, however, team sense-making helps mitigate them—or even avoid them.

- **Speed.** When interacting solo with AI, it’s easy to rush. You might skim AI-generated responses, jump quickly between prompts, and settle for shallow insights. In contrast, when you use AI with others, the pace naturally slows. People discuss, share perspectives, and challenge AI’s output more, leading to deeper thinking and better results.

- **Overreliance.** AI sounds convincing and very persuasive, even when it's wrong. On your own, you might trust it too much, especially in areas that require deep expertise you don't have. When you use AI with others, the mix of skills and expertise often triggers sharper questions, checking sources and challenging the accuracy of the output. This collective review improves the quality of the output.

- **Conformity.** AI reflects mainstream ideas, dominant patterns, or conventional thinking. If you use it individually, you may end up with a generic output that lacks originality. But in a team, diversity makes a difference. A mix of viewpoints, backgrounds, and ideas enriches the interaction with AI, resulting in more creative and differentiated outputs.

Humans-AI collaboration creates a virtuous cycle in which team dynamics simultaneously enhance outcome quality and mitigate risk. While access to AI technology will become widespread across all teams, the real distinction will come from those who know how to integrate it effectively into their ways of working. Teams that understand how to collaborate with AI, leverage collective judgment, and make it an active partner will stand out and generate significantly greater value than those who use it merely as a productivity tool.

CHAPTER 4

Twenty Team Activities That Are Enhanced with Generative AI

In section one, you have learned about the untapped potential of using generative AI beyond individual tasks and extending it into teamwork. This novel approach applies not just to the team meeting itself, but also before and after, along the entire collaborative journey. You've also seen that this is also highly beneficial: better quality of the output and enhanced risk mitigation.

If you're ready to start but you feel unsure about how to apply this in practice, you're not alone. Even AI-savvy managers often overlook opportunities to integrate AI into collaborative settings—either because it doesn't occur to them or because they lack practical examples and tips.

The rest of this book provides the examples and guidance you need to get started. Each of the next five sections focuses on a set of common team activities that can be enhanced with generative AI, grouped into five categories: planning, decision-making, ideation, problem-solving, and reviews and retrospectives (see table 4-1).

TABLE 4-1

Team activities that can be enhanced with gen AI

Category	Team activities
Section 2: Planning	• Strategy workshop • Goal setting and alignment • Operational planning • Project kickoff
Section 3: Decision-making	• Leadership team meeting • Steering committee • Go/no-go decision • Prioritization session
Section 4: Ideating	• Brainstorming • Hackathon • Customer-supplier workshop • Business model innovation
Section 5: Problem-solving	• Troubleshooting • Crisis response • Root cause analysis • Design thinking
Section 6: Reviews and retrospectives	• Business review • Project review • Solution review • Retrospective

You should easily find many team activities that apply to your job today —from strategy workshops, project reviews and brainstorming sessions to customer workshops, steering committee meetings, and troubleshooting.

In addition to the 20 team activities described in sections two to six, section seven introduces three new team activities enabled by AI.

Within each chapter, we describe the team activity comprehensively and break it down into three phases: before, during, and after. We provide “Try this” prompts for each phase that you can input into the gen AI model of choice and start experimenting. Feel free to adjust or customize them to your specific needs and context. Additionally, if your model allows you to create AI agents, you can use the prompts as part of the instructions for how the agent should interact with your team.

While each chapter will dive deeply into a specific team activity and its unique characteristics, it is also important to explore the broader, recurring

aspects that generative AI can enhance in teamwork. Table 4-2 provides an overview of these general applications, organized throughout the before, during, and after phases. For example, before a meeting, generative AI can prepare the agenda, develop content and materials, brief participants, design facilitation approaches, and anticipate team dynamics. During team meetings, AI can assist with note-taking, provide methodological support, simulate different perspectives, and act as a constructive challenger. After, AI can summarize team decisions, prompt reflection, and help execute on next steps.

TABLE 4-2

How gen AI enhances teamwork: Before, during, and after

Before	During	After
• Plan agenda, goals, participants, and logistics • Analyze stakeholders' expectations and preempt objections • Anticipate team dynamics • Define the facilitation approach • Customize briefing memos for participants • Research and develop content • Summarize background info and data • Select support methods and frameworks • Produce templates • Make prereading interactive	• Take notes, check agenda flow, and keep time • Provide tips to the facilitator • Support step-by-step methodology • Pull in real-time data, insights, and expertise • Check what may be missing in the discussion • Take perspectives • Wear the hat of a challenger • Create final output (multimodal)	• Summarize meeting and write minutes • Tailor messages for the stakeholders • Track what was said and by whom (memory) • Update documents and plans • Reflect on implications • Plan path forward • Collect feedback from participants • Capture learning and continuously improve

Beginning now, you're free to read the book in any order. You can continue sequentially, chapter by chapter, or you can flip ahead to any team activity that is relevant to you. Remember, you don't have to do it all to get value. If you're inspired, feel free at any time to put down the book, try a prompt, and reflect on how gen AI can help you enhance teamwork. Why wait? Turn the page, jump ahead, or return to the contents page to find the

activity that corresponds with your next meeting. It’s time to start experimenting with gen AI in your next team activity.

SECTION TWO

Planning in Teams with Generative AI

CHAPTER 5

Planning Activities That Are Enhanced with Gen AI

Planning meetings vary in scope and purpose. Some are strategic, high-level workshops that define direction at the company, divisional, or product level. Others focus on operational aspects, such as monthly marketing campaigns or production schedules. Many follow the rhythms of the business calendar, like annual strategy workshops or quarterly goal-setting sessions. Others arise from specific projects, such as launching a new service, rolling out a digital tool, or planning a restructuring. In these cases, planning often occurs at the start of the initiative.

Yet despite their critical importance, planning sessions often suffer from recurring pitfalls, ranging from poor preparation and misaligned goals to siloed and inward-looking discussions, superficial questioning of potential concerns and risks, to vague next steps. Gen AI offers a powerful and practical way to address these long-standing issues, helping teams and facilitators enhance focus, alignment, and execution along the planning journey.

Gen AI helps design the session structure, collect information, and prepare materials. And even more, gen AI enables participants to actively engage with prework through interactive prompts, encouraging deeper reflection and more thoughtful contributions before the session even begins. Planning discussions can now be significantly more robust: Gen AI

simulates competitor countermoves, anticipates stakeholder reactions, and role-plays user personas, bringing fresh perspectives and challenging assumptions in real time. After the session, gen AI consolidates outputs, facilitates monitoring and progress reviews, and helps teams dynamically adapt their plans as conditions evolve.

In this section you will learn how to leverage gen AI for strategy workshops (chapter 6), goal setting and alignment (chapter 7), operational planning (chapter 8), and project kickoffs (chapter 9) with concrete examples of prompts that you can try before, during, and after each session.

Planning sessions are the heartbeat of modern business, and they almost always involve collaborative teamwork. Regardless of your function or role, you'll find yourself gathering with colleagues, whether remote or in person, to define a direction and chart the path forward. Gen AI strengthens planning by enabling teams to align on the context, anticipate risks and opportunities early, and adapt plans (and their implications) quickly and coherently.

TABLE 5-1

How gen AI enhances team planning activities

Team activity	Before	During	After
Chapter 6: Strategy workshop	• Design the workshop • Ask strategic questions • Guide prereading	• Anticipate market and competitor moves • Facilitate breakouts • Simulate strategy pitches	• Consolidate and build narratives • Launch workstreams • Collect feedback
Chapter 7: Goal setting and alignment	• Align company priorities • Create drafts of well-framed goals • Consolidate inputs and check quality	• Facilitate discussion of objectives and results • Ensure consistency with strategy • Test robustness	• Formalize objectives and results • Identify cross-goal dependencies • Facilitate progress reviews

Team activity	Before	During	After
Chapter 8: Operational planning	• Create facilitation guides • Prepare interactives and collect data • Create draft plans	• Prioritize activities • Align timelines and resources • Optimize workflows	• Tailor sub-plans • Interact with KPIs for insights • Ensure dynamic adaptation
Chapter 9: Project kickoff	• Personalize onboarding • Guide self-reflection • Anticipate stakeholder dynamics	• Agree on a shared definition of success • Unearth concerns • Agree on next steps	• Circulate project plans • Create an FAQ list • Evaluate engagement levels

CHAPTER 6

Strategy Workshop

Traditionally, strategy workshops have been the only time in the year the leadership team and key stakeholders gather to reflect, discuss, and envision the organization's future strategic path. In theory, the format should allow participants to connect constructively and put their strategic thinking to work. In practice, wall-to-wall PowerPoint presentations are often the order of the day. Information flows in one direction, followed by improvised, open-mic Q&As. Teamwork, in the form of breakout groups, is poorly designed. The outsider's view is absent, making the strategy discussion too inward-looking. The ultimate output is vague, open to multiple interpretations, and leaves participants walking away with different versions of what was decided, rather than a clear, compelling view of the next strategic move.

Gen AI boosts productivity and enhances the output of your strategy workshop. It helps draft materials, structure agendas, and apply strategy frameworks and methods, making workshop preparation and execution faster and more efficient. It also equips you with new capabilities: AI simulates competitor and stakeholder moves, challenges your thinking with alternative scenarios, co-facilitates breakout discussions, and generates insights that refine and strengthen strategic decisions.

TABLE 6-1

How gen AI enhances strategy workshops

Team activity	Before	During	After
Strategy workshop	• Design the workshop • Ask strategic questions • Guide prereading	• Anticipate market and competitor moves • Facilitate breakouts • Simulate strategy pitches	• Consolidate and build narratives • Launch workstreams • Collect feedback

Before the Strategy Workshop

While every meeting benefits from preparation, a strategy workshop especially thrives when it is carefully designed and when participants arrive ready to contribute. Thoughtful planning and design ensure that strategic discussions are focused, productive, and impactful. Gen AI helps set the table: It guides you in selecting the most appropriate framework, formulating the right strategy questions, curating prereading materials, and even engaging participants beforehand so they come to the session informed.

Design the workshop. There's inherent methodological complexity in designing a successful strategy workshop, particularly when it comes to choosing the right framework. For example, if the goal is to make better strategic moves within your competitive field, Roger Martin's five questions framework offers a disciplined way to strategize the "where to play" and "how to win." [1] If instead the aim is to change the playing field itself, "Blue Ocean Strategy" by Renée Mauborgne and W. Chan Kim provides a lateral lens for exploring new markets and uncovers untapped demand.[2] And when the challenge is to rethink the wider ecosystem, *Open Strategy* by Christian Stadler and colleagues enables a more inclusive, transparent process.[3] Gen AI helps you bring methodological rigor to the workshop design, matching proven frameworks to workshop ambition and context.

- **Try this:** "Considering the most recognized strategy frameworks of the last 15 years, suggest which one or two best fit the workshop's

goal and context [*share or upload*] and explain why. If you need more detail on the workshop's goals, scope, participants, or expected outputs, ask me three clarifying questions before recommending."

- **Try this:** "Help design the strategy workshop for [*specify if it's for your unit or the broader organization*]. Engage with us in a dialogue one question at a time. Then recommend a proven strategy framework that best supports the workshop objectives."

- **Try this:** "Based on this framework [*specify, for example, Blue Ocean Strategy*], design a full workshop agenda that applies it to our organization's challenge [*specify*]. Include plenary sessions, breakout group activities, and presentations. Show how the different steps of the framework can be translated into exercises, outputs, and discussion flows for participants."

Ask strategic questions. Once you define the workshop structure and agenda, it's the strategic questions that will steer the conversation and shape the outcomes of a strategy workshop. Understanding the right questions to ask can be difficult to do on the spot. Gen AI helps formulate, evaluate, and improve questions that can boost participants' strategic thinking (for example, "Guide us, one step at a time, to shape three more strategic questions about [*specify*]"). Based on the goal, scope, and expected output of the workshop, AI can also recommend the order in which to ask questions and relevant tools or templates you may want to use during breakout sessions.

- **Try this:** "In preparation for the strategy workshop [*share or upload relevant information*], create a list of laddered questions, starting broad, then narrowing down, to help participants move from abstract strategic intent [*specify*] to concrete next steps."

- **Try this:** "Generate a sequence of 10 probing questions that move participants from diagnosing the current situation [*specify*] to envisioning a bold strategic move for our organization [*specify*]."

- **Try this:** “Design contrarian strategy questions that challenge our existing assumptions [*share or upload*] about [*specify*].”

Guide prereading. Gen AI helps engage participants ahead of strategy sessions. At times you may have found yourself skimming the prereading minutes before attending a workshop. Gen AI elevates prereading for all participants, making it a faster as well as more dynamic and personalized experience. AI can prompt reflection, ask questions in a dialogue, extract the most relevant information by role, and ensure that participants arrive at the workshop primed.

- **Try this:** “Based on this prereading [*upload, share, or link*], first summarize the five most important data points, insights, or trends I should take away. Ask me which resonates most with my priorities and role. Wait for my feedback. Then ask me four questions, one at a time, to help derive the strategic implications for my [*specify team, unit, or function*].”

- **Try this:** “Ask me three questions, one at a time, that can help you rewrite this prereading [*upload, share, or link*] as a 300-word brief for my role [*specify*]. Then list three provocative, board-level questions I could ask during the workshop to elevate the discussion.”

- **Try this:** “Based on this prereading [*upload, share, or link*], scan my emails, notes, and meeting minutes for the past 60 days for themes or questions related to the workshop topic [*specify*]. Then summarize key insights and ask for my feedback.”

During the Strategy Workshop

A strategy workshop is a unique opportunity to engage the key stakeholders, foster debate, and ensure strategic alignment. Achieving these results relies on the deliberate stretching of the strategic thinking at the workshop. Gen AI can indeed help with this: It helps explore alternative viewpoints or strategic moves, simulates outsiders’ perspectives, even role-plays the strategy pitch to help make it more compelling.

Anticipate market and competitor moves. Understanding how market players (customers, suppliers, value chain players, competitors, etc.) will respond to your next strategic move should be a key ingredient of every strategy workshop. Yet, incorporating this is complex: Even the most rigorous methods for predicting and explaining market behaviors (such as game theory) often fall short. As a result, the market players' reactions are rarely part of strategic discussions.[4] Gen AI helps fill this gap. By accessing publicly available information, gen AI takes perspectives and simulates the potential reaction or countermoves of a specific market player. It can also identify competitors and stakeholders you might have overlooked.

- **Try this:** "Take the perspective of our competitor [*specify company's name*] and help us reflect on three questions: Will our rival see our move [*specify*]? Will our rival feel threatened? Will our rival react and how?"

- **Try this:** "List five non-obvious countermoves we could consider against our competitor [*specify*] in the market [*specify*]. Start by asking us three questions to better understand the context."

- **Try this:** "Simulate the advice that the CEO of [*specify market player*] might give their team in response to our move [*specify*]. What actions might they take, and in what order of priority? The simulation should be grounded in public information."

Facilitate breakouts. The agenda of most strategy workshops has a slot dedicated to breakout sessions, where participants split into small groups to discuss key strategic issues and report back on their recommendations. The goal is to foster engagement and participation; however, the lack of dedicated facilitators in each breakout often leads to unfocused discussions, off-topic conversations, and a gradual loss of structure and momentum, which can ultimately drain energy from the room.[5]

Fortunately, gen AI enhances the effectiveness of breakout groups. By using predefined prompts, each group can leverage gen AI as a facilitator. AI guides the conversation with a list of questions, ensuring consistency across breakout groups. It can also capture insights and summarize each group's recommendation.

- **Try this:** "Act as a facilitator of our breakout group discussion on [*specify*] using this structure: (1) clarify the challenge, (2) explore three alternative strategic moves, (3) identify trade-offs, and (4) recommend one path forward. After each step, wait for our answers and provide your candid feedback to help us refine our thinking."

- **Try this:** "Guide us, one step at a time, to reflect on three strategic risks we are underestimating in [*specify your plan, strategic move, or recommendation*]."

- **Try this:** "Based on the goal of this breakout [*specify goal*] and the expected output [*specify*], act as facilitator and guide us, as a team [*specify who you are*], through structured thinking to develop the output. Proceed one step at a time, waiting for our answer."

Simulate strategy pitches. In many strategy workshops, participants are asked to pitch their strategic recommendations quickly and in front of senior leaders. Doing so under pressure and being able to address tough questions in real time can be challenging. Gen AI provides twofold support: It helps groups craft a compelling narrative for their strategy recommendations, and it prepares them to handle tough objections by simulating skeptical stakeholders, asking probing questions, and providing counterarguments.

Acting as a communication coach, gen AI helps participants exercise their storytelling muscles.[6] In addition, it can also play the role of an investor or doubtful executive by asking tough questions.

- **Try this:** "Act as a skeptical investor and ask each of us [*specify who you are*] one tough question on our pitch [*share, upload, or dictate*]."

- **Try this:** "Challenge our pitch [*share, upload, or dictate*] by asking five questions about its broader impact (employee and societal value dimensions). Push us to consider other dimensions we may have overlooked."

- **Try this:** "List three pushbacks we might get from the CEO [*specify*] on our pitch [*share or upload*]."

- **Try this:** "Give specific, time-stamped feedback on where to adjust pace, tone, and style to improve delivery of our pitch [*share, upload, or dictate*]."

PROMPT FOR TEAM-AI DIALOGUE

Supporting Breakout Groups in Strategy Pitch Preparation

You (gen AI) guide our breakout group that includes [*list members*] in preparing to pitch the strategy recommendations we discussed so far.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to introduce ourselves and to share our draft recommendations in turn. Then guide us, one question at a time, to build a clear and compelling pitch: the problem we're addressing, our proposed moves, and the expected impact.

[*Step 2*] Challenge us with three probing questions to sharpen the pitch and emphasize distinctiveness. Ask one at a time and wait for our answers.

[*Step 3*] Ask us to name two skeptical stakeholders we want you to play. Then take each role in turn. Raise one objection to our pitch, wait for our answer to the objection, and give short candid feedback before moving to the next stakeholder.

[*Step 4*] Produce a concise draft of our final pitch: a four-paragraph narrative that includes the problem, our proposed strategy, the expected impact, and why it holds up under the challenge of the two skeptical stakeholders.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

After the Strategy Workshop

Generative AI helps consolidate notes, the output of breakout sessions, and transcripts of plenary conversations into a coherent strategic narrative and visual road map. It supports the planning and the launch of the first workstreams, which translate the strategic direction of the road map into clear action. Finally, it innovates the traditional process of collecting and analyzing participant feedback.

Consolidate and build narratives. In most workshops, insights end up scattered across slides, sticky notes, filled templates, and side conversations. Big ideas often lose their context, and the output risks becoming fragmented and vague. Generative AI helps with consolidating notes, cleaning up raw output, and transforming them into a coherent storyline that captures both the logic and the energy of the workshop. It acts as a narrative builder, connecting data points, discussion highlights, and decisions into a structured draft of the workshop story.

- **Try this:** "Cluster our workshop notes [*share or upload*] into three overarching themes. Then ask us one question at a time to refine them until we reach agreement."

- **Try this:** "Based on our draft [*share or upload*], propose two alternative storylines that explain our strategic discussion from insights into our next strategic move. Facilitate our group discussion by asking us to choose, combine, or adjust."

- **Try this:** "Return the consolidated narrative [*share or upload*] in five bullet points. Ask us to react: Does this reflect our understanding? If not, guide us, one question at a time, toward a shared narrative."

Launch workstreams. The typical output of a strategy workshop is a visual, multiyear road map translating the strategy ambition and vision into a set of workstreams. Gen AI supports the launch of the first workstreams from mundane tasks, such as drafting charters or project plans, to more complex ones, such as acting as a methodological guide for when to use a specific framework or stress-testing the most critical assumptions.

- **Try this:** “Based on the results of the strategy workshop [*share or upload*] and considering the scope of our workstream [*specify*], facilitate our team discussion, one question at a time, to define our key milestones over the next 90 days. Wait for our feedback. Then create a draft plan we can refine together.”

- **Try this:** “Guide us through a risk identification exercise: What could derail our workstream? Wait for our feedback. Then categorize risks [*specify*] and discuss mitigation strategies with us.”

- **Try this:** “Help us identify the top three critical success factors of this workstream [*specify*]. Wait for our feedback.”

Collect feedback. Capturing participant feedback is essential. Instead of relying on a standard survey, you can use AI to craft reflective prompts that encourage participants to think more deeply about their experience. This makes feedback collection more engaging and personalized. Gen AI then consolidates these reflections, clusters them into categories (such as what went well or what could have been done differently), and generates a clean summary ready to share by email with the leadership.

- **Try this:** “Ask me four self-reflective questions to understand if the discussion was inclusive and engaging.”

- **Try this:** “Help review participants’ feedback [*upload or link*] by clustering into categories. Summarize key insights; extract two participant quotes for each cluster. Then draft a one-page summary tailored for [*specify stakeholder, for example, sponsor, HR, CEO*].”

- **Try this:** “Suggest improvements for our next workshop, one recommendation at a time. Rotate across categories (such as agenda design, facilitation flow, gen AI integration, participant engagement). Pause after each suggestion, waiting for our feedback before generating the next.”

CHAPTER 7

Goal Setting and Alignment

To stay aligned and effective, teams need clear goals. Goal-setting frameworks like objectives and key results (OKRs) are now widely popular: "Objectives" are the goals that inspire your team and explain what is to be achieved, while "key results" are metrics that allow benchmarking and monitoring how the team gets to the objective.[1] Within this framework, success is measured not by what any one individual does but, rather, by the overall impact of the team.

There are four common pitfalls teams traditionally confront when setting goals with frameworks like OKRs: First, they lack strategic clarity, and teams begin from different interpretations of company priorities and misalign their goals from the outset. Second, they fall into the trap of quantity over quality. They have too many objectives, written hastily, with results that measure activities instead of outcomes. Third, they tend to think in silos, producing objectives that fail to activate critical synergies and, in some cases, are in conflict. Finally, teams enter discussions unprepared, with little prework or training, reducing a potentially strategic exercise to a hastily assembled laundry list.

Gen AI will make your next goal-setting session more productive. It speeds up drafting objectives that align with the company's strategy and guides the team in applying the chosen method, offering examples and suggestions for improvement. It also helps formalize, communicate, and monitor the final list of objectives and results, streamlining what used to be

time-consuming tasks. Beyond productivity, AI unlocks deeper capabilities that were previously hard to harness. It can identify hidden misalignments, suggest synergies for shared goals, and help the team stress-test their objectives by exploring scenarios and refining them in ways that drive stronger alignment.

TABLE 7-1

How gen AI enhances goal setting and alignment

Team activity	Before	During	After
Goal setting and alignment	• Align company priorities • Create drafts of well-framed goals • Consolidate inputs and check quality	• Facilitate discussion of objectives and results • Ensure consistency with strategy • Test robustness	• Formalize objectives and results • Identify cross-goal dependencies • Facilitate progress reviews

Before Goal Setting and Alignment

In the preparation phase, generative AI helps teams align on company priorities, generates a draft of well-framed goals, helping focus on quality over quantity, and consolidates a team's inputs into a structured template to serve as a springboard for the goal-setting session.

Align company priorities. Before a team begins to brainstorm and discuss goals, it must first establish a clear and shared understanding of the company's priorities. Without such alignment, a team risks drafting goals that pull in different directions, weakening strategic coherence. Generative AI helps translate your company's strategy into what it means for your team (for example, "If we delivered on the company's priorities [*share or upload*], what would success look like?"). This helps every team member connect and relate to the strategy in a practical way, with a shared understanding before the session.

- **Try this:** “Help us, as a team, reflect on how each company priority [*share or upload*] links to our work. First, ask us three context questions, one at a time. Then, based on our answers, generate self-reflection questions that make the connection to each priority practical and relevant.”

- **Try this:** “Explain the company’s strategic priority [*specify*] as if to a new team member. First, ask us three questions, one at a time, about our team. Then use our answers to generate examples of what this priority means for us in day-to-day work.”

- **Try this:** “Based on the company’s strategic priorities [*share or upload*], create two pairs of examples for our team [*specify your team mission*]: one goal aligned with the priorities and one that seems reasonable but is misaligned. Explain why the aligned goal supports strategy and why the misaligned one does not.”

Create drafts of well-framed goals. Generative AI helps teams overcome “blank-page syndrome” when composing goals. Before the session, it can draft a list of objectives (for example, “Apply the OKR framework and write 10 goals for our team [*specify*] that clearly link to the company’s strategic priorities [*share*]”), providing a springboard for ideation while ensuring that best practices for implementation are followed. By leveraging AI’s ability to take perspectives (whether from a peer function, executives, or customers), the team can avoid the trap of siloed thinking (for example, “Draft three goals for our team as expected by our client [*specify*]”). Gen AI helps you reflect on synergies as well as potential dependencies with other units or functions.

- **Try this:** “Act as an OKR coach. First, explain in simple terms what makes well-framed OKRs. Then give us three examples of poorly framed OKRs and ask us to rewrite them. Give us feedback based on best practices.”

- **Try this:** “Provide three examples of goals for our team [*specify*] that invite collaboration with other functions [*specify*], while still staying aligned with company-level priorities [*share or upload*].”

- **Try this:** “Draft three goals for our team [*specify*] as if written from the perspective of our CEO [*specify*], focused on how we contribute to the company’s strategic priorities [*share or upload*].”

Consolidate inputs and check quality. Gen AI both simplifies and elevates the collection of inputs in preparation for the session. With a predefined prompt, gen AI helps participants reflect on important objectives they think their team should pursue. This not only speeds up preparation but also provides a more engaging approach to input collection. Gen AI then consolidates everyone’s contributions into a draft list, identifying areas of overlap, synergies, and gaps (for example, “Analyze all team members’ draft objectives [*share or upload*], and suggest where they may be in conflict or overlapping”).

- **Try this:** “Engage with me in a dialogue to help me reflect on the company’s objectives [*share or upload*], and what they mean for my team. Start by asking me two questions about my team.”

- **Try this:** “Based on this consolidated list of draft objectives [*share or upload*], what are opportunities for collaboration with other teams or functions, such as [*specify*]? Let’s discuss together.”

- **Try this:** “Based on this consolidated list of draft objectives [*share or upload*], identify the key trade-offs my team [*specify*] may face in pursuing them. Suggest three reflection questions we should discuss to make these trade-offs explicit during the session.”

During Goal Setting and Alignment

When the application of a goal-setting methodology makes or breaks the success of a team activity, it’s imperative to provide adequate support to participants. Gen AI acts as a methodological guide for each team by facilitating the team’s discussion, ensuring consistency with company strategy, and stress-testing quality and robustness of chosen objectives and results.

Facilitate discussion of objectives and results. Gen AI helps team members review the draft list of objectives and select the most relevant and important objectives that align with the company's priorities. Then, for each objective, gen AI can draft three or four results instead of starting from scratch. During the session, the team can also use AI as a methodology expert, from answering the team's questions and sharing examples to providing feedback on quality.

PROMPT FOR TEAM-AI DIALOGUE

Leveraging AI as Facilitator of OKR Discussion

You (gen AI) guide our team that includes [*list members*] in reviewing the OKRs for our team *[share or upload an initial draft if available]*.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to introduce ourselves and our familiarity with the OKR methodology. Wait for our answer. Then recap the OKR methodology briefly and ask if we need clarifications before starting.

[*Step 2*] Analyze our draft list and suggest improvements based on best practices. Wait for our feedback and refine the list based on our comments.

[*Step 3*] Challenge us by bringing in two lateral perspectives we may have overlooked (for example, customer views, employees expectations, peer functions, leadership expectations) and ask us questions, one at a time, to reflect on their relevance.

[*Step 4*] Guide us through a two-step prioritization: Which objectives should be at the top of the list? Which can be dropped or merged? Make sure we all contribute after each step.

[*Step 5*] Stress-test the robustness of the key results: Are they measurable, outcome-focused, ambitious but achievable? Challenge us with a specific question and suggest refinements.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.

- Always ask for feedback before proceeding to the next step.

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Ensure consistency with strategy. When teams' objectives connect clearly to the company's strategic priorities, they provide people with a sense of purpose in their day-to-day work. Yet being able to define and explain this connection is easier said than done. Gen AI helps your team reflect on how to link draft objectives to your company's priorities, flagging weak or missing links, and suggesting ways to articulate the strategic connection.

- **Try this:** "Test alignment: Map our team's objectives [*share or upload*] back to the company's strategic priorities [*share or upload*] and flag any that risk pulling us in a different direction and suggest reframing options."

- **Try this:** "Challenge us: If we could only keep three objectives of this list [*share or upload*], which would create the strongest impact on the company's strategy [*specify*], and why?"

- **Try this:** "For each selected objective [*share or upload*], generate one sentence that we can use to explain how it connects to the company's strategy [*specify*] to all employees in motivational language."

Test robustness. Objectives and results may look good on paper but fail in practice. With the support of gen AI, teams can stress-test their objectives across numerous dimensions: methodology application (Do they follow the discipline and best practices?), strategic alignment (Do they advance our company's vision?), operational execution (Can we objectively measure them?), and resilience (Would they remain valid if the context shifted?).

- **Try this:** "Guide us, one question at a time, to understand which objectives [*share or upload*] could be most exposed to the risk of strategic misalignment."

- **Try this:** “Simulate two ‘stress scenarios’ [*specify*] and analyze which objectives from this list [*share or upload*] would hold up and which would fail. Then discuss with us.”

- **Try this:** “Analyze our list of objectives and results [*share or upload*] and flag potential weaknesses that are most critical to fix.”

After Goal Setting and Alignment

The hard work of goal setting and alignment does not end at the conclusion of the team session. First, the discussion rarely lands on a final, polished list of OKRs. Second, it takes time and in-depth reflection to identify critical dependencies or conflicting signals that might derail execution.[2] Third, tracking progress requires more than simply measuring key results, but also evaluating the continued relevance of the objectives, allowing for necessary refinement. Let’s explore how gen AI can help your team overcome these challenges.

Formalize objectives and results. Generative AI turns the raw output of the goal-setting session into a well-crafted and structured list of teams’ objectives and results that can be shared and communicated internally. It can also help teams anticipate how different stakeholders might understand and respond to their objectives and support them in tailoring communication for different audiences.

- **Try this:** “Check whether each objective in this list [*share or upload*] is inspirational and directional. Suggest edits.”

- **Try this:** “Evaluate balance and accuracy in this list [*share or upload*]: Does each objective have two or three results that are specific, measurable, and time-bound?”

- **Try this:** “Rewrite this objective [*specify*] from the perspective of an internal stakeholder [*specify, for example, executive or peer function*], while preserving its original intent and meaning. Only adjust the language to make it clearer and more relevant.”

Identify cross-goal dependencies. In large organizations, teams often struggle with a series of dependencies that create inefficiencies and slow progress. The challenge is that many of these dependencies go unacknowledged until they block execution. By using gen AI, teams can better anticipate and understand the dependencies connected to their objectives and results (for example, "List three dependencies that our team might face when delivering these results [*share*]"). In addition, AI can create a visual map of the network of dependencies, even color-coding them according to category: delegated work, shared work, supporting work, etc.

- **Try this:** "List all potential dependencies our team [*specify*] may have with other teams [*specify*], based on this list of objectives and results agreed during the session [*share or upload*]."

- **Try this:** "Guide us, one step at a time, in the prioritization of the most critical dependencies that could jeopardize delivery of our team's objectives and results [*share or upload*]."

- **Try this:** "If these are the most critical dependencies [*share or upload*] our team has, which ones should we track first? Suggest how we can anticipate and prevent them from turning into bottlenecks that might slow our team's progress."

Facilitate progress reviews. To be effective, objectives and results must be frequently updated. They are animated by periodic check-ins, objective grading, and continuous reassessment. Beyond tracking and monitoring data, gen AI also contributes to the check-ins by suggesting questions that test the continued relevance of the objectives (for example, in response to a change in regulations or market conditions), discussing the most critical challenges they're facing. AI can also help teams analyze setbacks, extract lessons learned (for example, "Ask us, one question at a time, to reflect on the bigger picture. Where are we making the most meaningful progress?"), and refine the goal-setting strategy for the next cycle.

- **Try this:** "Identify early-warning signs in our progress data [*share or upload*] that may indicate risks of underperformance and propose three questions we should discuss to address them."

- **Try this:** “Looking at our list of objectives and results [*share or upload*], what uncomfortable trade-offs are we avoiding? Ask us questions, one at a time, that force us to confront them directly.”

- **Try this:** “From the perspective of an external stakeholder [*specify, for example, investor, customer, regulator*], what tough questions would they ask about our current goals’ progress?”

CHAPTER 8

Operational Planning

Once the strategy is set and translated into ambitious objectives, the next team activity is operational planning. This is the starting point to cascade the high-level strategy into the day-to-day work of the organization: Workstreams and related activities inevitably touch multiple departments and functions.

During the operational planning activity, the team works together to build a plan on a short- to medium-term horizon, identifying the list of activities, key milestones, and resources required. This could take the shape of a new production plan for factories, a marketing plan for customer outreach, or an upskilling plan for talent development.[1] The goal in operational planning is to detail the action items, align roles and responsibilities, and agree on key milestones.

A well-crafted operational plan should focus on *how* planning is done, not just *what* is being planned. Despite good intentions, many teams fall into common traps that undermine the effectiveness of their plan. They may reuse the previous year's numbers ("Let's add or reduce by x%") without challenging underlying assumptions. They may describe actions in broad, general terms ("We'll do this") without specifying the sequencing, resources, and timing needed for execution. Or they may fail to map all interdependencies, overlooking those that can create bottlenecks or risks later.

When done poorly, an operational plan can even weaken buy-in.[2] Team members leave the session uncertain about how their work contributes to

achieving the broader strategy, what they will need to deliver differently, and how to measure their success.

Gen AI makes operational planning more productive by helping teams collect and analyze data, prepare templates, and guide discussions on goals, actions, resources, and potential challenges. Beyond productivity, it unlocks new capabilities that were previously difficult or impossible. For example, AI allows teams to talk with KPIs: monitor progress, challenge assumptions, and provide guidance to dynamically adapt plans as circumstances change. It can also generate personalized action plans for each team.

TABLE 8-1

How gen AI enhances operational planning sessions

Team activity	Before	During	After
Operational planning	• Create facilitation guides • Prepare interactives and collect data • Create draft plans	• Prioritize activities • Align timelines and resources • Optimize workflows	• Tailor sub-plans • Interact with KPIs for insights • Ensure dynamic adaptation

Before Operational Planning

Compared to strategic or high-visibility meetings, operational planning often lacks detailed preparation because it seems like more routine or less complex activity. This is a mistake: When the right participants, necessary data, and proper facilitation are missing, the output is weak, requiring additional work or rework afterward.

Gen AI helps during the preparation phase, from speeding up mundane tasks, such as drafting the agenda and sending invites, to supporting more complex tasks, such as collecting and analyzing data, designing the facilitation flow, and then drafting a plan to be discussed by the team.

Create facilitation guides. Gen AI creates a step-by-step guide that will help the team build the operational plan during the session.

While high-stakes workshops often have external professional facilitators, most operational planning sessions don't because they're typically led by managers. In this case, gen AI can be particularly helpful. For example, it structures the discussion, suggests smart questions (such as "How does activity X support our operational goal better than activity Y?" or "Are we sure that we are not overlooking any external factors or resource constraints that could derail this plan?") and ensures that the team will avoid common pitfalls (such as overlooking important dependencies or not challenging the plan enough).

- **Try this:** "Suggest a sequence of five questions to structure the discussion about [*specify*] considering [*share or upload contextual information*]. Also recommend the best facilitation technique."

- **Try this:** "Create a detailed facilitation flow for a three-hour operational planning session, with time limits, activities, and transitions that keep the team [*specify*] engaged and aligned on these priorities [*share or upload*]. Before drafting the flow, ask me four context questions about the session so you can tailor it effectively."

- **Try this:** "List the five most common pitfalls in operational planning sessions and propose two facilitation tips to prevent each. Present them one by one. After describing each pitfall, stop and ask me to confirm if it is relevant before continuing."

Prepare interactives and collect data. Generative AI makes the process of collecting data and filling out templates more productive and engaging. When information is readily available, it retrieves and uses it to automatically populate some boxes of the template. When additional information is needed from the participant, it can ask questions and return a prefilled template as output of the human-AI dialogue.

- **Try this:** "Review this template [*share or upload*] and prefill all sections where information can be retrieved automatically from

[*share, link, or upload*]. For any section that remains blank, provide an example and then ask me clarifying questions to capture the missing input."

- **Try this:** "Ask me the essential questions, one at a time, that help you complete this template [*share or upload*]."

- **Try this:** "Help me get ready for the session by role-playing a facilitator. Ask me questions, one at a time, based on this template [*share or upload*]."

Create draft plans. When all inputs and prefilled templates are collected from the various workstreams, gen AI saves time by analyzing, consolidating, and drafting a plan that you can use as the starting point for the session. It also helps the team identify issues such as weak strategic alignment, overlooked interdependencies, missed synergies, unclear execution details, vague accountabilities, inconsistent timelines, or resource allocations (for example, "Analyze which activities share the same resources and list them as tension points").

- **Try this:** "Consolidate all participants' preparatory input [*share or upload*] into a draft operational plan organized by [*specify, for example, workstream, owner, activities, milestones, dependencies, etc.*]. Mark any inconsistencies or missing elements as 'attention points.'"

- **Try this:** "Compare this draft plan [*share or upload*] with last year's operational plan [*share or upload*]. Draft a one-page summary of what has disappeared, what is unchanged, and what's new."

- **Try this:** "Based on this draft plan [*share or upload*], help me, the session facilitator, understand the gaps and inconsistencies. Recommend how to tackle them, in what sequence, and with which facilitation questions."

During Operational Planning

During the operational planning session, the team works through a draft plan that incorporates the contributions gathered from all participants beforehand. Beyond ensuring discipline in timing and flow, gen AI can support the quality of the planning process by helping the team prioritize operational goals and related activities, identify synergies and critical interdependencies, agree on timelines and resources, and list risks that may hinder goals' achievement.

Prioritize activities. An effective planning session should work from the draft plan created prior to the meeting, which consolidates all inputs and ideas gathered in the preparation phase and moves directly into prioritization. Gen AI contributes as a team member to this discussion by providing ideas on critical touchpoints, sequencing requirements and dependencies that may impact the various workstreams. It also supports the evaluation and ranking of goals and activities, providing constructive feedback (for example, "Challenge our selection of priority operational goals [*specify*] taking the perspective of [*specify*]").

- **Try this:** "Based on our discussion so far on top-priority actions, explain where resource conflicts might arise."

- **Try this:** "Identify potential touchpoints and synergies across the activities in our plan [*share or upload*] that we may not be fully leveraging in our prioritization."

- **Try this:** "Before we wrap up, summarize our prioritization discussion and challenge it by taking the role of [*specify*]."

Align timelines and resources. Making trade-off decisions on the spot is often difficult because they require solid data and the ability to model scenarios. When gen AI can access company's data sources (for example, forecasts, budgets, capacity reports), it can ask the team the right questions in terms of timelines and sequencing. When a trade-off emerges, gen AI simulates scenarios and helps stress-test different options (for example, "Compare our draft plan's resource needs [*share or upload*] with the staff utilization report [*share or upload*] and identify any gaps in capacity").

- **Try this:** "Identify activities in this document [*share or upload*] that share the same resources. Flag when two or more activities depend on the same owner, or when one person is assigned to more than three activities."

- **Try this:** "Based on operational priorities [*share or upload*], generate a high-level road map for each of them, linking dependencies across teams and highlighting where slippage in one milestone will impact others."

- **Try this:** "List the potential trade-offs we face if resources [*specify, for example, budget*] are constrained in this plan [*share or upload*]. For example, what delays would result if [*specify, for example, budget is cut by 10%*]."

Optimize workflows. Generative AI helps teams reflect on potential inefficiencies in workflows, overlaps, or redundancies across activities and areas for optimization of the sequencing (for example, "Guide us, one question at a time, in the discussion of potential areas of optimization (for example, overlaps, redundancies, sequencing, bottlenecks) in our plan [*share or upload*]"). AI brings lateral thinking, but also a more structured approach to the detection of early-warning signals for potential risks.

- **Try this:** "Analyze this plan [*share or upload*] and ask us one question at a time to identify redundant or overlapping activities. Suggest how they could be streamlined or consolidated."

- **Try this:** "Based on best practices in workflow design, identify where reordering of [*specify*] could reduce bottlenecks, shorten timelines, or improve efficiency."

- **Try this:** "In this plan [*share or upload*], list 10 potential risks that may create [*specify, for example, delays, misalignments*]. Suggest two mitigation actions for each risk."

PROMPT FOR TEAM-AI DIALOGUE

Workflow Optimization

You (gen AI) guide our team that includes [*list members*] in reflecting on potential workflow issues that could hinder execution of this operational plan [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to introduce ourselves and to briefly describe the workflow and its most critical bottlenecks and the handoff points that create friction. Make sure we all contribute. Then capture and list the bottlenecks and handoff points clearly.

[*Step 2*] Suggest additional issues commonly overlooked in similar workflows. Ask us to confirm which of these apply to our context and refine the list based on our feedback.

[*Step 3*] Draft a consolidated list of workflow issues. Wait for our feedback.

[*Step 4*] Guide us, one question at a time, to prioritize which issues are most important to address during this quarter. Confirm our selection before proceeding.

[*Step 5*] For each prioritized issue, propose three actions for reducing or eliminating them. Ask us to react, refine, and confirm.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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After Operational Planning

When the session is over, gen AI translates the plan into detailed sub-plans tailored to the teams that should be executing them. Gen AI can also augment the traditional reporting and monitoring process by providing a conversational interface to talk to the plan's key performance indicators (KPIs) and contribute to review meetings, spotting changes to the plan and suggesting actions to adapt dynamically.

Tailor sub-plans. Depending on the scope and complexity of the operational plan, there might be a need to create sub-plans. For example, a refinery's production plan may need to be broken down into a dozen plant-level plans, with a local team managing each. Similarly, a global marketing plan may require dedicated sub-plans for brand management, customer outreach, or digital campaigns.

- **Try this:** "Based on the overall plan [*share, upload, or link*], ask us [*specify team's area*] questions, one at a time, that can help us create a tailored sub-plan."

- **Try this:** "Guide us, one step at a time, in drafting our team's sub-plan [*specify area*], summarizing key goals, deliverables, dependencies, and timelines aligned with the broader operational plan [*share or upload*]."

- **Try this:** "Generate a one-page dashboard for our team [*specify area*] that shows our own KPIs, milestones, and how they connect to the broader plan [*share or upload*]."

Interact with KPIs for insights. With gen AI, performance insights become conversational—status reports no longer need to be static. Instead of passively monitoring dashboards, teams can interact with their operational goals and KPIs, ask questions, and explore performance challenges during review meetings. Gen AI's potential lies in surfacing signals, modeling likely scenarios, and suggesting next best actions, empowering the team with a new level of decision intelligence.

- **Try this:** "Analyze the monthly data [*share, link, or upload*] and help us understand which initiatives are progressing slower than expected. Then for each of them, ask us two questions to help us uncover potential root causes."

- **Try this:** "Suggest three questions we can ask to the owner of the goal about how they plan to address the performance gap [*specify*]."

Ensure dynamic adaptation. As with any other plan, things will inevitably change after implementation begins. Gen AI acts as the team's analyst, monitoring deviations from the initial plan and suggesting actions to adapt dynamically. During the team's discussion, it simulates scenarios and challenges whether the original assumptions still hold true.

- **Try this:** "Analyze the recent changes in the market [*specify*], then guide us, one question at a time, to reflect how they may affect our plan [*share*], and how to update the plan accordingly."

- **Try this:** "If the plan changes [*specify the changes*], are there KPIs that may no longer align with our strategic priorities?"

CHAPTER 9

Project Kickoff

Projects are everywhere.[1] As organizations adapt to fast-changing markets and evolving business needs, your calendar likely reflects this shift with a growing number of project launches and kickoffs. These can cover anything from rolling out a new HR system or upgrading IT infrastructure to refreshing the company website, launching training programs, moving offices, or implementing new review processes. Each requires a kickoff to align teams and set expectations. When done well, these meetings are invaluable, but too often they fall short. You've probably experienced it: a vague invite with no clarity on your role, followed by a flood of difficult-to-digest slide decks. In the meeting, it becomes clear that stakeholders hold different views of the project's scope, objectives, or definition of success. Instead of reaching alignment, you sit through a one-way slide presentation, with no time to flag real concerns about timelines, resources, or feasibility. You leave with no clear accountability, unanswered questions, and a lingering sense of frustration. If this scenario resonates with you, you're not alone. This situation is remarkably common and has been well documented in management literature for years. Yet despite extensive research and countless articles and books on best practices, these issues persist.[2]

Gen AI helps prepare project kickoffs efficiently by producing onboarding materials, structuring agendas, converting discussions into actionable next steps, circulating project plans, and generating FAQs. Yet AI's true potential goes beyond routine productivity. AI can guide participants through interactive reflection on background materials,

anticipate stakeholder concerns by analyzing potential dynamics, facilitate discussions during the meeting, and monitor engagement levels in real time.

Before Project Kickoffs

AI transforms the preparation phase by personalizing onboarding for each participant's role, analyzing stakeholder expectations, and aligning the team through interactive prereadings. Instead of entering the room with questions to catch up, team members arrive with clarity, shared understanding, and readiness to contribute.

TABLE 9-1

How gen AI enhances project kickoffs

Team activity	Before	During	After
Project kickoff	• Personalize onboarding • Guide self-reflection • Anticipate stakeholder dynamics	• Agree on a shared definition of success • Unearth concerns • Agree on next steps	• Circulate project plans • Create an FAQ list • Evaluate engagement levels

Personalize onboarding. AI helps create and distribute a tailored memo for each kickoff participant. The goal is to ensure that everyone understands their role, the project context, and what is expected of them, avoiding confusion and boosting engagement from the very start.

- **Try this:** "Based on the project description [*share or upload*], create a summary of the key project points tailored for [*specify participant and related project's role*], highlighting only the information most relevant to their contribution."

- **Try this:** "Ask questions, one at a time, that help you write a memo for [*specify participant*] based on this project description [*share or upload*]."

- **Try this:** “Draft a 200-word brief that clearly explains what is expected from [*specify participant*] in the project [*share or upload*], including responsibilities, key deliverables, and main objectives. Ask me one question at a time.”

Guide self-reflection. To ensure that participants arrive at the meeting well-informed and engaged, AI guides them through a structured reflection process. Instead of relying on lengthy prereadings, which people often skip, AI engages in a conversation. This approach actively involves participants, helping them understand the project background and preparing them effectively for the kickoff discussion.

PROMPT FOR TEAM-AI DIALOGUE

Pre-Kickoff Reflection

You (gen AI) help our team that includes [*list members*] prepare for the kickoff meeting about [*specify*] based on the prereading material [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us about our role in this project. Wait for our answer. Then pitch us the prereading material in 300 words.

[*Step 2*] Ask which aspects of the project we feel unclear or uncertain about. Wait for our answer. Then search in the prereading materials for any information that can address our doubts.

[*Step 3*] Ask us two questions, one at a time, about our expectations on the project and potential concerns we may have. Wait for our answers, then build on them by listing previously expressed concerns on this project as documented in emails, chats, or meetings.

[*Step 4*] List the relevant questions we should raise during the kickoff meeting. Wait for our feedback before refining the list.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don’t be pleasing.

- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Anticipate stakeholder dynamics. Gen AI helps analyze and anticipate interactions among participants, ensuring a smoother, more effective meeting. The goal is to identify expectations, potential concerns, and interpersonal dynamics to tailor proper engagement and address potential concerns.

- **Try this:** "Analyze expectations gathered from previous interviews [*share or upload*] with stakeholders [*specify*], summarizing in a table the participants' key priorities and concerns."
- **Try this:** "Based on past meetings and emails exchanged with the project's stakeholders [*specify*], anticipate dynamics and potential conflicts that may emerge during the kickoff meeting [*specify*], and suggest strategies for addressing them effectively."
- **Try this:** "Draft a list of potential concerns that each participant [*specify*] may raise during the kickoff meeting [*specify*]."

During Project Kickoffs

Too often, kickoff meetings are treated as perfunctory boxes to check, just repeating what's already on the slide deck, without real discussion. Yet kickoff meetings should be sessions where you create real value and mitigate risk proactively. With everyone at the table, this is the time to align expectations for a shared definition of success. It's also the opportunity to unearth concerns, inviting people to voice doubts, challenge assumptions, and flag potential issues with the plan, timeline, or resources.

Agree on a shared definition of success. At the start of a project, teams often use the word "success" as if it carries a shared meaning, but in reality, each participant may interpret it differently based on their role, priorities, or

experience. Sometimes, even when using the same terms, people may be referring to entirely different outcomes. The kickoff offers the opportunity to surface and reconcile these perspectives. By guiding the team through structured, step-by-step reflection and synthesis, AI helps make these definitions explicit, uncover hidden divergences, and co-create a shared understanding of success.

- **Try this:** "Based on project's goal [*specify*], provide two examples of what success can look like for our team [*specify*]."

- **Try this:** "Ask us questions, one at a time, to verify that we are all on the same page for project success. Flag discrepancies."

- **Try this:** "Draft two definitions of success for our project's goal [*specify*] that integrate everyone's input, based on the discussion so far, and invite our feedback."

Unearth concerns. Risks, constraints, and tensions are often present at the start of a project but not always voiced. Some teams avoid difficult topics out of politeness, hierarchy, or fear of disrupting momentum. Yet what's not discussed early often surfaces later when it's harder to address. AI guides the participants in a structured, nonconfrontational way. It suggests targeted questions to prompt reflection, act as a neutral challenger to raise potential blind spots, and help rework concerns into actionable mitigation strategies.

- **Try this:** "Generate five questions to help us identify potential risks, constraints, or concerns, especially those that could affect planning, timelines, or delivery. For example: 'What assumptions are we making that could be challenged later?' or 'What dependencies might create bottlenecks?'"

- **Try this:** "Act as a challenger by proposing common but often unspoken concerns based on the project context [*share or upload*] and invite our feedback."

- **Try this:** "List all concerns raised during the discussion so far and illustrate how each of them, if left unaddressed, could derail the

project later on and suggest possible mitigation strategies or adjustments to the plan."

Agree on next steps. Gen AI supports translating team discussion into actionable next steps, being specific about tasks, timelines, and accountability, flagging gray areas or areas of overlap, and helping translate commitments into an action plan (for example, "Ask us three clarifying questions to check that we are all aligned on next steps").

- **Try this:** "Summarize the next steps we just agreed on in a table, including who is responsible, by when, and any dependencies."

- **Try this:** "Analyze the roles and responsibilities discussed so far, flagging any gaps, overlaps, or ambiguities. Ask us two specific clarifying questions."

- **Try this:** "Draft a personalized alignment memo for [*specify participant*], summarizing their role in the project, main responsibilities, and who they'll need to collaborate with. Include three immediate next steps to help them get started and suggest practical ways to trigger those actions."

After Project Kickoffs

Gen AI helps turn planning materials into dynamic, personalized, and interactive experiences. Participants can "talk with the plan," asking gen AI questions like: "What are my immediate priorities?" or "Who do I need to coordinate with?" Gen AI can also generate dynamic FAQs based on meeting discussions and chat inputs, and explain concepts when the project manager isn't available. Finally, gen AI helps the owner of the kickoff monitor engagement levels and meeting dynamics, analyzing sentiment and participation.

Circulate project plans. Generative AI quickly assembles personalized versions of the plan for each participant, highlighting relevant responsibilities, dependencies, and timelines. It offers an interface to interact with the plan, engaging in a dialogue through questions. This

conversational approach helps reinforce clarity, trigger action, and maintain momentum after the meeting.

- **Try this:** "Generate a clean, structured version of the project plan [*share or upload*] based on what was discussed during the meeting [*share or upload recording or transcription*], including timelines, responsibilities, and dependencies."

- **Try this:** "Help me, the facilitator, reflect on whether the plan [*share or upload*] feels actionable and complete, and suggest areas that may need clarification or follow-up based on team feedback during the kickoff meeting."

- **Try this:** "Create three conversational ready-to-use prompts that we can copy and paste into our gen AI model to interact with our project plan for [*specify goal*]."

Create an FAQ list. Often, questions go unaddressed during the kickoff—due to time constraints, hesitancy, or simply because they emerge only once execution begins. Gen AI creates FAQs capturing all the questions raised during the kickoff discussion. Beyond that, gen AI makes the FAQs interactive, engaging participants in a conversation, providing answers when the project manager isn't available.

- **Try this:** "Generate an FAQs list based on the project materials and on the kickoff discussion [*share or upload recording or transcription*], including both addressed and unanswered questions, grouped by themes."

- **Try this:** "Help me, the facilitator, reflect on FAQ usage patterns, for example, which questions are asked most and which remain unclear, and suggest whether additional documentation, clarification sessions, or role-specific onboarding might be needed to maintain alignment."

- **Try this:** "Review unanswered questions from the kickoff meeting [*share or upload recording or transcription*] and draft follow-up actions or owners for each."

Evaluate engagement levels. Generative AI helps analyze explicit feedback as well as subtle signals, such as participation levels, who contributed most actively, who stayed muted, who raised concerns or criticisms, and sentiment shifts and conversational dynamics. This provides facilitators with a comprehensive view of not only what participants said but how it was received.

- **Try this:** "Summarize sentiment patterns throughout the kickoff discussion [*share or upload recording or transcription*], indicating where energy or tone shifted (for example, enthusiasm, hesitation, disagreement)."

- **Try this:** "Identify moments when the conversation [*share or upload recording or transcription*] became one-sided and suggest strategies to reengage quieter voices in future meetings."

- **Try this:** "Analyze the meeting transcript [*share or upload*] and identify moments of tension or disagreement. Discuss with me what triggered them, how they were handled, and suggest specific follow-up actions to restore alignment and strengthen collaboration."

SECTION THREE

Decision-Making in Teams with Generative AI

CHAPTER 10

Decision-Making Activities That Are Enhanced with Gen AI

Every organization runs on decisions about going in a new strategic direction, entering a new market, approving an investment in new technology, or reshaping a portfolio of initiatives. Good decisions drive ongoing execution, resolving resource conflicts, choosing between project paths, or stopping experiments that no longer hold promise. The most important decisions are rarely made by one person. From the CEO deliberating with the executive team to a cross-functional team choosing how to tackle an operational issue, corporate decisions are a collective exercise, shaped through discussion, evaluation, and negotiation.

But making timely and high-quality decisions is not easy. Preparation is often rushed, with participants coming to the table underinformed or misaligned, not just on *what* but also on *how* they will make the decision.[1] During the meeting, discussions may look overly inward, dominated by politics, consensus bias, or lack of clarity on trade-offs. And after the meeting, follow-through often falters: Rationales are forgotten, accountability blurs, and decisions fail to cascade clearly into the organization.

This makes decision-making activities fragile. How they are prepared, facilitated, and followed up often determines whether choices propel the

organization forward or trap it in cycles of delay, rework, and lost momentum.

Gen AI can enhance team-based decision-making by improving productivity: It helps prepare agendas, executive briefings, and supporting materials; summarizes items to prioritize; aligns stakeholders; structures discussions; and translates meeting outcomes into clear next steps. Beyond that, AI enables teams to make better decisions by role-playing multiple perspectives (including those of absent stakeholders), exploring what-if scenarios, flagging hidden issues, and challenging conventional thinking.

In this section you will learn how to leverage gen AI for leadership team meetings, steering committees, go/no-go decisions, and prioritization sessions, with concrete examples of prompts that you can try before, during, and after each session.

TABLE 10-1

How gen AI enhances decision-making

Team activity	Before	During	After
Chapter 11: Leadership team meeting	• Establish points of deliberation • Create executive briefings • Anticipate team dynamics	• Provide the decision framework • Check decision robustness • Navigate tensions	• Communicate and cascade decisions • Recognize decision implications • Apply learnings on team dynamics
Chapter 12: Steering committee	• Align stakeholders • Highlight areas of focus • Engage participants with prereading	• Facilitate discussion • Provide guidance and best practices • Play the role of absent stakeholders	• Document discussion and decisions • Align project plans • Translate decisions into concrete actions

Team activity	Before	During	After
Chapter 13: Go/no-go decision	• Support proposal preparations • Preempt objections • Brief decision-makers	• Discuss key assumptions • Explore what-if scenarios • Facilitate consensus building	• Communicate and explain the decision • Explore implications of “go” decisions • Conduct postmortem on “no-go” decisions
Chapter 14: Prioritization session	• Summarize items to prioritize • Align on prioritization methods • Design the scoring template	• Consolidate scoring • Challenge the scoring • Calibrate and converge	• Explain the ranking • Reflect on new priorities • Review and fine-tune prioritization methods

CHAPTER 11

Leadership Team Meeting

Leadership team meetings are an opportunity for senior leaders to come together not just to align on priorities and make decisions, but also to build trust, strengthen collaboration, and shape how they work together as a team.

When done well, these meetings help drive clarity, momentum, and a shared sense of ownership. They're also where leadership culture is nurtured through high-impact conversations, mutual respect, and collective problem-solving. But they're not immune to common pitfalls. Agendas are filled with urgent but unimportant items, often listed in the order in which they were submitted. Leaders often arrive unprepared and lack a clear framework for who decides what. Without discipline and structure, meetings can drift into unfocused and inconclusive discussions. Assumptions go unchecked, alternatives are not explored, and the drive for consensus leaves critical questions unasked. The result is the illusion of alignment: around the table, leaders nod in agreement, but once the meeting ends, doubts surface in hallway conversations and informal chats. What seemed like consensus quickly fragments into complaints or passive resistance. As a result, leaders leave in a sour and cynical mood.

Ineffective meetings are a major frustration for leaders, and with good reason. Time is their scarcest and most precious resource. When they spend it poorly in diffuse discussions never even meant to result in any decision, the price of misused time is high.[1]

Gen AI can make leadership team meetings more productive by improving the design of the agenda, ensuring the appropriate time allocation for the most important items. During the discussion, gen AI

guides the application of a decision framework, enhancing the leadership team's capacity to make decisions and to communicate them clearly.

TABLE 11-1

How gen AI enhances leadership team meetings

Team activity	Before	During	After
Leadership team meeting	• Establish points of deliberation • Create executive briefings • Anticipate team dynamics	• Provide the decision framework • Check decision robustness • Navigate tensions	• Communicate and cascade decisions • Recognize decision implications • Apply learnings on team dynamics

Beyond productivity, AI can help leaders focus on the most important issues, consider all viable alternatives, and navigate tensions to make the best possible choice given the time available. It can also extract and analyze learnings on what worked well, what didn't, and how to improve the next meeting.

Before the Leadership Team Meeting

Gen AI helps in the preparation phase, from drafting a clear agenda and decision flow to creating executive briefings and anticipating dynamics that may hinder healthy debate and slow decision-making.

Establish points of deliberation. Most leadership team meeting agendas are framed as a list of topics, not as a set of questions to answer. Too often, they lack a clear owner, and as a result, they end up listing the items in the order in which they were submitted. Gen AI enhances the design of the meeting by helping clarify what the meeting is meant to achieve and which format or approach to use, and generating a list of questions and supporting evidence that can elevate the leadership team's discussion.

- **Try this:** “Help me, as facilitator, clarify the *why* of our next leadership team meeting by asking me questions, one at a time, about the goal, scope, and type of decision to be made. Then draft a one-hour agenda based on my answers.”

- **Try this:** “Based on this agenda [*share or upload*], guide me, one step at a time, to craft five questions that frame the issues in a way that helps the leadership team make a decision on [*specify*].”

- **Try this:** “Help me, as facilitator, design the flow of our next leadership team meeting. Ask me questions, one at a time, about the items I’m planning to include, specifically their nature (strategic, operational, informational) and sequence (what to discuss first and last). Then, based on my answers, suggest appropriate time allocation and draft a two-hour agenda.”

Create executive briefings. Meetings when people have an uneven knowledge of the context and a lack of supporting data or evidence are a waste of time. In these situations, teams spend time playing catch-up instead of jumping on a productive discussion. Gen AI accelerates and improves the briefing process. By drawing inspiration from proven formats, such as Amazon’s six-page memo, gen AI helps create well-structured briefs, which—if needed—can also be tailored to each participant’s role.[2] It can then make the review of the documentation more engaging and interactive. For example, gen AI can read the brief aloud and turn it into an audio summary or even into a podcast-style debate that presents multiple viewpoints, helping participants reflect on alternatives and broaden their thinking before the meeting.

- **Try this:** “Ask me questions, one at a time, to help draft a [*specify*]-page executive brief for the next leadership team meeting [*share or upload agenda and list of participants*]. Refer to best-practice briefing models such as Amazon’s six-page memo to structure the brief.”

- **Try this:** “Tailor this briefing [*share or upload*] to [*specify participant’s role*], highlighting what to focus on in preparation for

the meeting [*share or upload agenda*].”

- **Try this:** “Based on this briefing [*share or upload*], act as the meeting organizer and discuss with me, a participant in the next leadership team meeting [*share or upload agenda*], key items, one at a time.”

PRACTICAL TOOLS

AI-Enhanced Notebooks and Podcasts

AI-enhanced notebooks such as Microsoft Copilot Notebooks or Google NotebookLM allow storage of documents, notes, and files in one place, making them easily searchable and fully interrogable using natural language. Beyond organizing content, they also support features like podcast creation: Based on a brief, they curate relevant material and generate a narrated audio summary you can listen to or share. These notebooks transform static information into dynamic, interactive formats.

Anticipate team dynamics. Decision meetings are not purely rational discussions; they are also shaped by emotions. Yet intense reactions may cloud the leadership team’s judgment and misguide their decision. By analyzing past meeting records, gen AI can help identify triggers, such as topics or questions, that may provoke strong emotions or frustrations in the team. It can then suggest techniques to manage these dynamics constructively, avoiding poor decisions.

- **Try this:** “List and briefly explain the team dynamics that may emerge during the next leadership team meeting [*share or upload agenda and list of participants*] based on patterns from past meetings [*specify*].”

- **Try this:** “Simulate tension points that may arise in the next leadership team meeting [*share or upload agenda*] between [*specify participants*].”

- **Try this:** “Explain best practices through examples and scripts that can help handle potential tensions and strong emotional responses

during the next leadership team meeting [*share or upload agenda and list of participants*] on [*specify topics or items*].”

HOW GEN AI CAN HELP RESOLVE A CONFLICT BEFORE IT EVEN HAPPENS

We often create customers’ profiles to help predict their potential reactions. What if we applied the same approach to leadership teams?

This is exactly what Tracey Franklin, Moderna’s chief people and digital technology officer, does with the help of generative AI. Using available data such as personality studies and contributions to past meetings, she creates profiles of the company’s executive team to simulate scenarios where conflict may arise. She then reflects with AI on her potential role and determines how she can best foster reconciliation.

When used to anticipate perspectives, contributions, and reactions, gen AI can raise the odds of successful meetings.

Source: Sara Braun, “This Moderna Leader Uses AI to Resolve Conflict on the Executive Team—All Before It Even Happens,” *Fortune*, May 19, 2025, https://fortune.com/2025/05/19/moderna-leader-ai-resolve-conflictexecutive-teamall-before-it-happens/.

During the Leadership Team Meeting

Gen AI can improve the effectiveness of leadership teams’ decision-making by offering frameworks and real-time guidance, stress-testing the strategic consistency of decision options, and adjusting the facilitation to manage tensions during the meeting.

Provide the decision framework. Two common pitfalls occur at the beginning of leadership team meetings: declaring the decision to make rather than the decision-making *process* to follow, and latching onto the first seemingly viable option rather than dedicating time to discussion and exploration of the problem and various alternatives. Gen AI acts as a co-facilitator by following a predefined decision flow, suggesting questions that encourage people to speak up and share diverse perspectives, and introducing alternative or even provocative viewpoints to help the team think more critically.

- **Try this:** “Help our team [*list members*] follow the decision process one step at a time (clarify the problem, review data, explore options, weigh trade-offs, decide, assign owners). Keep us on track, and flag us if we skip steps or jump to conclusions.”

- **Try this:** “List three techniques that can help us generate some energized dissent during our team discussion, such as ‘What could go wrong with this approach?’ or ‘Are there risks we haven’t considered?’”

- **Try this:** “Help me, the facilitator, understand if someone is dominating the discussion so far, marginalizing others.”

- **Try this:** “Suggest alternative perspectives on [*specify*] that we haven’t considered yet and explain how they differ from our team viewpoint.”

Check decision robustness. Too often when a decision is made, the leadership team fails to test whether it aligns with the company’s strategic directives. Gen AI acts as a critical reviewer that asks probing questions, encourages the team to consider all relevant dimensions, and takes alternative perspectives (for example, those of competitors, investors, or customers).[3] In addition, it can surface evidence and data to support the discussion, grounding it in facts rather than in the leadership team’s assumptions, anecdotes, or incomplete information.

- **Try this:** “List five ‘What if?’ and ‘How?’ questions that encourage our team to assess the feasibility of our decision [*specify*].”

- **Try this:** “Stress-test the robustness of our decision [*specify*] against two adverse scenarios.”

- **Try this:** “Help us focus on this trade-off [*specify*] by asking us three questions, one at a time, to weigh the costs and benefits.”

- **Try this:** “Benchmark our decision [*specify*] against how leading competitors [*specify*] might approach it. Your analysis should be grounded in public information about our competitors.”

Navigate tensions. Every leadership team meeting is full of signals and cues about participants' interests and intentions. It can be difficult to notice all the emotions in the room and capture in real time what meeting participants are implying, rather than just saying. Gen AI can analyze the discussion and interactions as they happen, spotting dysfunctional patterns, as well as dynamics that are red flags (such as signs of polarization, power plays, or artificial time pressures).

- **Try this:** "We had a tense start. Based on best practices, what can I, as facilitator, do to help participants process emotions and foster renewed unity and purpose?"

- **Try this:** "List three open-ended questions I can use to acknowledge everyone's perspectives and encourage alternative ones when the discussion becomes polarized."

- **Try this:** "Summarize the perspectives and concerns raised so far in our discussion and highlight where we have common ground, as this will help us refocus on the issue at hand."

- **Try this:** "The team is avoiding this difficult topic [*specify*]. Suggest three ways in which I can reduce tension and open the conversation."

- **Try this:** "There's unspoken fear in the room. Suggest questions I can ask to understand the underlying source of that fear based on Amy Edmondson's psychological safety framework."[4]

After the Leadership Team Meeting

Gen AI translates the meeting outcomes into clear communications that you can share inside or outside the organization. It also supports reflection on both the implications of the decision and the team dynamics surrounding it, capturing learnings that help run more effective meetings in the future.

Communicate and cascade decisions. After the meeting, leaders often need to announce their decision to others. What they frequently overlook is

explaining *how* the decision was made.[5] Without context (data, facts, alternatives considered), those affected may find it confusing or even threatening. Gen AI can enhance leaders' ability to communicate the decision made in a clear way that helps others not only understand but also embrace it by crafting storytelling tailored to different audiences. Gen AI can also take the perspective of different audiences, assessing how the message will be received and suggesting ways to improve.

- **Try this:** "Guide us, one question at a time, to reflect on how we can communicate this decision [*specify*] most effectively to [*target audience*], highlighting potential areas of confusion or misunderstanding."

- **Try this:** "We want to create an internal communication for [*specify target*] about our recent [*specify*] decision. Ask us clarifying questions, one at a time, about context, rationale, audience concerns, and tone. Then, based on our answers, craft the communication step-by-step."

- **Try this:** "Guide us, one step at a time, in creating an engaging storytelling flow making the decision [*specify*] relatable to [*specify audience*] and compelling not just rationally but also considering emotional aspects to ensure that it resonates."

- **Try this:** "Take the perspective of [*specify*], review our draft communication [*upload*], and suggest adjustments to improve clarity, tone, and overall reception."

- **Try this:** "Help us plan how to cascade the decision [*specify*] across our organization, covering all layers and functions [*specify functions*]. For each group, consider appropriate formats, channels, and tailored messaging. Proceed step-by-step: After presenting each step, pause and ask for our feedback before moving on."

PROMPT FOR TEAM-AI DIALOGUE

Communicating and Cascading a Decision

You (gen AI) guide us, the leadership team, in reflecting on how to communicate and cascade our decision [*specify*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to explain why the decision was made and what we want to achieve. Wait for our answer. Then act as the communications manager in charge of communicating this decision internally and ask three sharp questions, one at a time, to gather more details on the rationale.

[*Step 2*] Ask us which functions are primarily impacted by the decision. Wait for our answer. Then take the perspective of one function at a time and list in a table how those functions are likely to react, their concerns or fears, and opportunities they may see.

[*Step 3*] Draft a one-page internal communication about the decision to be shared with the functions impacted, making sure it preempts their likely concerns or questions with a constructive, diplomatic tone.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Recognize decision implications. Sending a message is no guarantee everyone has received and understood it. After they make a decision, leaders need to reflect and monitor two dimensions: first, how the decision affects business performance, people, and processes; and second, how different audiences are likely to interpret and react to it, based on culture, experience, and emotional context. Gen AI can simulate potential reactions, highlight misunderstandings, and suggest ways to address potential concerns constructively.

- **Try this:** "Analyze how our decision [*specify*] may impact [*specify, for example*, *team*, *organization*, *customers*, *partners*], and

highlight possible unintended consequences."

- **Try this:** "Our decision [*specify*] has uncertainties around [*specify*]. List 10 tough questions that [*specify audience*] may ask us."

Apply learnings on team dynamics. Gen AI helps the leadership team reflect on how the team works and makes decisions together. By capturing and analyzing interactions, participation patterns, and moments of tension, it provides insights that reduce unproductive postmeeting chatter and fuel continuous improvement in how to run future leadership team meetings.

- **Try this:** "How would an executive team coach comment on the key dynamics observed in our meeting [*share or link*], such as participation levels, dominant voices, or marginalized perspectives?"

- **Try this:** "Compare today's meeting [*share or link*] with past sessions with the same participants [*specify*] and highlight recurring strengths and weaknesses in our team dynamics."

CHAPTER 12

Steering Committee

Steering committees are a widely used governance mechanism in organizations, especially for overseeing complex, cross-functional, or strategic initiatives. Whether it's a digital transformation program, a product development effort, a regulatory compliance project, or a strategic partnership, these meetings serve as a milestone where senior stakeholders come together to assess progress, resolve issues, and make directional decisions.

Their prevalence stems from the need to coordinate across departments, align priorities, and ensure accountability in high-stakes initiatives. However, too often, these meetings become routine check-ins rather than strategic conversations. Stakeholders may arrive unprepared or misaligned, and discussions can drift into status updates while the real issues go unaddressed. Decisions get put off, issues or roadblocks are left unresolved, and follow-up actions remain vague. Part of the problem stems from how people behave in group settings.[1] Cognitive, psychological, and social barriers often prevent individuals from sharing unique insights. People may self-censor, avoid raising concerns, or conform to dominant voices, especially in hierarchical environments. This means that critical information, alternative perspectives, and valuable dissent often stay hidden, leading to decisions that are less robust than they could be.

Gen AI can help steering committees overcome common pitfalls such as misalignment, shallow discussions, and unclear follow-through. It ensures that meetings start with shared understanding, stay focused on critical issues and related risks, and conclude with a clear path forward. Gen AI can even

go beyond that: It helps anticipate potential stakeholder misalignments and prompts reflection on each participant's expectations. It supports discussions by structuring and deepening dialogue, offering guidance in terms of best-practice frameworks and alternative perspectives.

TABLE 12-1

How gen AI enhances steering committees

Team activity	Before	During	After
Steering committee	• Align stakeholders • Highlight areas of focus • Engage participants with prereading	• Facilitate discussion • Provide guidance and best practices • Play the role of absent stakeholders	• Document discussion and decisions • Align project plans • Translate decisions into concrete actions

Before the Steering Committee

Gen AI helps teams prepare by aligning stakeholders, making prereading materials interactive, and focusing the agenda on items that require strategic governance.

Align stakeholders. Before important steering committee meetings, one-on-one sessions are often conducted to clarify each stakeholder's expectations and concerns. Gen AI helps prepare the questionnaire for these sessions and then summarizes the insights. It can also take the perspective of individual stakeholders to anticipate misalignments and potential conflicts that may arise during the steering committee meeting.

- **Try this:** "Summarize each stakeholder's [*specify*] main priorities and what they expect from the meeting on [*specify*] based on transcripts [*share or upload*] of alignment calls and email exchanges. Then suggest where stakeholder interests align and where tensions or disagreements may arise."

- **Try this:** “Draft personalized one-page briefs to explain to each stakeholder [*specify*] how the steering committee meeting’s agenda [*share or upload*] connects to their roles.”

- **Try this:** “Take the perspective of [*specify stakeholder*] and explain what priorities might be misaligned with those of [*specify another stakeholder*] and what tensions could emerge during the discussion about [*specify*]. Base your analysis on previous meetings’ minutes [*share or upload*].”

Highlight areas of focus. In a limited time, steering committees must focus on what’s key for the successful delivery of the initiative or program. Gen AI can help teams prioritize the most relevant updates while leaving enough room for discussion of strategic risks and the decisions needed to address them.

- **Try this:** “Ask us questions, one at a time, to help us identify the top three issues that require the strategic attention of the steering committee on [*specify project or initiative*].”

- **Try this:** “Review the draft meeting agenda [*share or upload*] based on the company’s strategic priorities [*share or upload*] and recommend which topics the steering committee should address first, ordering them from the most strategic to the most tactical.”

- **Try this:** “Guide us, one step at a time, on the order of discussion for the next steering committee’s meeting, based on stakeholders [*share the list*] and their potential dynamics, so that we address critical issues and potential conflicts early.”

Engage participants with prereading. Prereading materials are often dense. Their audiences often review them unevenly or skip them entirely. Gen AI helps readers interact with these materials faster and more effectively. It can trigger a personalized reflection, so each stakeholder arrives prepared and ready to share their perspective on the agenda’s items with the rest of the team.

- **Try this:** “Help me, the facilitator, create a copy-paste prompt that [*specify stakeholder*] can run with AI to engage in a dialogue based on this prereading [*share or upload*]. The conversation should help the [*specify stakeholder*] understand the content, meeting’s objectives, and decisions that we need to make.”

- **Try this:** “Based on this prereading [*share or upload*], discuss with me, offering one reflection at a time, on the relevant questions we should discuss at the meeting and which dimensions need deeper consideration.”

- **Try this:** “Help me summarize the most relevant aspects of this prereading [*share or upload*] from my perspective first and then consider how another stakeholder [*specify*] might view it, so I am prepared to handle objections.”

During the Steering Committee

Gen AI acts as a co-facilitator, helping guide the strategic discussion, providing examples and critical information that inform deeper thinking, and inviting all perspectives—even dissenting or absent ones—into the team discussion.

Facilitate discussion. Too often, steering committee meetings fall into predictable patterns: Stakeholders echo familiar narratives, outspoken leaders monopolize the debate with their dominant voices, while others tune out because they don’t feel their input can change the final decision and prefer avoiding tension. As a result, attendees miss critical insights and overlook assumptions, and decisions lose strategic sharpness. Gen AI can help shift these dynamics, making conversations more honest, inclusive, and multidimensional. It encourages candid dialogue by bringing out dissenting viewpoints.

- **Try this:** “Help me, as the facilitator, make the discussion more effective. Suggest five questions I can ask to ensure that all voices are heard, and surface perspectives that might otherwise be withheld.”

- **Try this:** "Ask us two tough, open-ended questions that would help push our discussion forward by surfacing potential blind spots or weaknesses that our competitor [*specify*] would immediately exploit."

- **Try this:** "Guide us, one step at a time, in surfacing dissenting views by suggesting three prompts that make dissent psychologically safer and intellectually useful. Wait for our answers and then give us feedback."

HOW GEN AI CAN BRING CANDOR TO DISCUSSIONS

At a European investment firm, senior leader Lukas observed that the company's culture was deeply averse to conflict. "We're very nice to each other," he admitted, "even when we should not be." In an effort to bring a strategic challenge to the steering committee's discussion, Lukas has been experimenting with bringing AI into the discussion by assigning it the role of *challenger*. In the middle of the debate, Lukas pauses and prompts AI to critique the team's ideas, highlighting misalignments and overlooked issues, and bringing in extreme, dissenting views. "Even when the feedback is brutally candid," Lukas notes, "it never feels like finger-pointing. Paradoxically, AI creates psychological safety to spark more honest and constructive debate."

Provide guidance and best practices. Gen AI can help guide the flow of the steering committee by suggesting the right sequence of questions, offering best-practice approaches, and providing concrete tips for a productive discussion. It can prompt additional thinking or debate and encourage the group to explore alternative angles.

- **Try this:** "What's your feedback on our discussion flow so far? Base your analysis on the best practices for running a steering committee meeting effectively."

- **Try this:** "Guide us step-by-step in framing the discussion with the right questions, based on this steering committee's agenda [*specify*], one step at a time, waiting for our answers."

- **Try this:** "We have the impression that our discussion starts drifting and losing its initial focus. How do you suggest structuring the rest

of the conversation?”

Play the role of absent stakeholders. Not all relevant voices are always in the room; when key perspectives are missing, decisions risk being incomplete, biased, or not made at all. Gen AI can simulate the viewpoints of absent or underrepresented stakeholders, nurturing the discussion of steering committee members.

- **Try this:** “Key stakeholders [*specify, share, or upload information about each of them*] are absent from today’s meetings [*share or upload agenda*]. Explain why their perspectives are important and what insights or concerns they might bring to [*specify discussion’s topic*].”

- **Try this:** “Act as [*specify stakeholder*] and simulate the concerns, priorities, or objections they might raise about [*specify discussion’s topic*]. Base your suggestions on previous emails and calls [*share or upload*].”

- **Try this:** “Challenge us to think laterally on [*specify discussion’s topic*]. Ask five questions, one at a time, like ‘Whose external perspective is missing, and what might they challenge?’”

After the Steering Committee

Gen AI helps document decisions and why they were made, clarify the changes (for example, in terms of scope and timeline), and ensure that new directions are communicated downstream and translated into concrete operational actions.

Document discussion and decisions. Steering committee members often struggle to retain the context of past decisions. They may forget why they made a particular choice, which can lead to repeated debates or misaligned follow-ups. Gen AI can act as a decision memory bank, maintaining a searchable history of past discussions, decisions, and the rationale behind them. This ensures continuity, helps new members catch up quickly, and provides a clear record for accountability.

- **Try this:** “Summarize key decisions and debates from today’s meeting [*share or upload minutes or recording*] for easy reference. Document dissenting opinions or alternative viewpoints to maintain transparency. Ask for our feedback and revise accordingly.”

- **Try this:** “Generate a concise summary for absent stakeholders [*specify*] to ensure alignment and to flag any pending item or next step for them.”

- **Try this:** “Based on the meeting minutes [*share or upload*], reconstruct the team’s discussion on [*specify issue*]. Identify who supported and who opposed it, the main concerns we raised, and the mitigation actions we discussed.”

Align project plans. Gen AI can help reflect on the main implications for the project or the initiative, typically in the form of changes to scope, timeline, accountabilities, and resources. By connecting decisions to the specific project context, it ensures that the project team remains aligned with strategic priorities and the committee’s guidance.

- **Try this:** “Based on steering committee decisions [*share or upload*], outline the main implications for the project plan [*share or upload*].”

- **Try this:** “Ask us questions, one at a time, to help us reflect on the implications of the steering committee’s decision [*share or upload*] for our workstreams or function [*specify*].”

- **Try this:** “Review the overall project plan [*share or upload*] for consistency with steering committee decisions [*share or upload*] and strategic objectives.”

Translate decisions into concrete actions. Decisions are only valuable if they are clearly understood and effectively executed. Gen AI can help operational teams translate steering committee outcomes into actionable tasks, ensuring clarity for all team members, including those not present in the meeting, limiting misunderstandings, and reinforcing accountability.

- **Try this:** “Help us communicate the steering committee decisions [*share or upload*] to [*specify team or function*] so they clearly understand what actions are expected of them. To start, ask us three questions, one at a time, about key contents, tone, and format.”

- **Try this:** “Guide us [*specify operational team*], one step at a time, in converting the steering committee decisions [*share or upload*] into concrete, actionable tasks.”

- **Try this:** “Based on steering committee decisions [*share or upload*], suggest how to reprioritize actions and adjust our work plan [*share or upload*] or sequencing if needed.”

PROMPT FOR TEAM-AI DIALOGUE

Reflecting on Implications of Steering Committee Decisions

You (gen AI) guide our team that includes [*list members*] in interpreting the steering committee’s decisions [*share or upload*] and translate them into concrete actions and downstream decisions.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us questions about our team composition and roles. Wait for our answers. Then ask one sharp question about how the steering committee’s decisions impact us.

[*Step 2*] Guide us, one question at a time, about what we need to start and stop in order to implement the steering committee’s decision.

[*Step 3*] Summarize in a table with two columns (start and stop). Suggest two overlooked actions in each column based on previous emails or meeting minutes if available.

[*Step 4*] Based on the table, suggest three questions we should raise with the steering committee for clarification.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)

- Challenge ideas constructively. Don’t be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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CHAPTER 13

Go/No-Go Decision

Go/no-go decisions are pivotal checkpoints of organizational governance and risk management. Whether they're a project gate in product development, an investment decision in R&D, a major M&A approval, or a strategic partnership, these meetings serve the same essential purpose: to determine whether a proposed initiative, project, or deal should move forward, pause, or stop altogether.[1] When run well, go/no-go meetings help teams make more-informed decisions, prioritize resources effectively, identify risks early, test assumptions rigorously, and build alignment around the best course of action.

But these meetings can also go wrong. Unclear or incomplete proposals often fail to address key concerns or critical questions. Decision-makers may arrive without fully understanding the context or essential details, treating the meeting as a formality rather than a rigorous evaluation. They may fail to challenge key assumptions or probe deeper into potential risks. Power dynamics can overshadow objective analysis, with the loudest voices steering the outcome. Initiatives that decision-makers should terminate often continue to drain resources, while they delay or defer difficult but necessary decisions. When a project is finally halted, the reasons and lessons learned are rarely documented, missing a valuable opportunity for organizational learning.

Gen AI can make go/no-go meetings more productive by helping prepare proposals, briefing decision-makers, and documenting the final decision, ensuring that participants come informed, discussions stay structured, and outcomes are captured. Beyond productivity, gen AI can elevate the

discussion by focusing on the key drivers of decision-making and exploring how different scenarios may impact outcomes. It also helps reflect on the implications of "go" decisions and capture lessons from a "no-go" decision, strengthening future initiatives.

TABLE 13-1

How gen AI enhances go/no-go decisions

Team activity	Before	During	After
Go/no-go decision	• Support proposal preparations • Preempt objections • Brief decision-makers	• Discuss key assumptions • Explore what-if scenarios • Facilitate consensus building	• Communicate and explain the decision • Explore implications of "go" decisions • Conduct postmortem on "no-go" decisions

Before the Go/No-Go Decision Meeting

Gen AI helps the organizing team prepare for a go/no-go decision meeting by ensuring that proposals are clearly summarized, potential objections are anticipated, and decision-makers are well briefed.

Support proposal preparations. Participants often submit lengthy proposals in which the most important points are buried and easily overlooked. Gen AI can extract and clarify the proposal's core elements, ensuring that they're presented in compelling language and follow the required format or template. It can also check alignment with strategic priorities and verify that all criteria and requirements are met.

- **Try this:** "Act as [*specify*] and help us review our draft proposal [*upload*] and identify any gaps or missing information that we should clarify before submission."

- **Try this:** "Suggest where additional data or evidence could strengthen our proposal [*share or upload*]."

- **Try this:** “Help us verify that our proposal [*share or upload*] meets all submission requirements [*link*]. Before analyzing anything, ask us clarifying questions about the proposal type and submission context.”

Preempt objections. Gen AI helps teams anticipate the most likely objections or tough questions that decision-makers may raise during the meeting and prepare convincing, evidence-based responses.

- **Try this:** “Draft concise, evidence-based responses to the top-five anticipated objections to our proposal [*share or upload*].”

- **Try this:** “Act as a skeptical decision-maker and role-play with us to test how well we handle tough questions or counterarguments to our proposal [*share or upload*]. Proceed one question at a time.”

- **Try this:** “From the perspective of [*specify stakeholder*], outline the three main reasons for a ‘go’ decision versus a ‘no-go’ decision.”

- **Try this:** “Guide us, one step at a time, to anticipate the dynamics among decision-makers [*specify*] and who is likely to shape opinions, lead the discussion, or act as a key influencer.”

- **Try this:** “Based on the potential questions and objections we discussed so far, critically review our proposal [*share or upload*] to strengthen it before submission.”

Brief decision-makers. Gen AI helps prepare briefing materials, distill complex content, and support decision-makers in reflecting ahead of the meeting, ensuring that everyone has the right context and clarity on the potential choices.

- **Try this:** “Distill the proposal package [*share or upload*] into a two-page briefing for the decision-maker [*specify*] participating in the meeting [*specify*].”

- **Try this:** “Help me (a decision-maker) familiarize myself with the content [*share or upload*], distill the key assumptions, and reflect on the decision criteria (match or no match).”

- **Try this:** “Create a prompt (to copy and paste into an AI model of choice) that guides decision-makers to reflect, one step at a time, on the content of the proposal and the dimensions to consider for the decision, identifying what supports a ‘go’ or ‘no-go’ decision and why.”

During the Go/No-Go Decision Meeting

During the meeting, gen AI helps structure the discussion around evidence and assumptions, simulating the potential impact of different scenarios, and helps support a more productive, data-informed debate that leads to a well-considered decision.

Discuss key assumptions. Gen AI can guide the identification, interrogation, and challenge of the critical assumptions underlying a proposal, including those that may be hidden, unverified, or missing. By testing some of these assumptions against available evidence, gen AI helps ground the discussion in facts rather than opinions, surfacing potential risks and prompting reflection on the consequences of moving forward.

- **Try this:** “Help us focus the discussion on the five key assumptions, one at a time, that could make or break the proposal [*share or upload*], prompting reflection on whether the plan is ready to proceed.”

- **Try this:** “Stress-test the validity of critical assumptions [*specify*] and highlight areas where additional data or mitigation is needed in our proposal [*share or upload*].”

- **Try this:** “In our discussion so far, what assumptions are we taking for granted that could flip our go/no-go decision?”

Explore what-if scenarios. Gen AI can help the team explore alternative scenarios to test whether the proposal is robust enough to warrant a "go" decision. By simulating different conditions and a full range of potential outcomes, AI ensures that risks, resource implications, and strategic consequences are fully considered before committing.

- **Try this:** "Help us discuss, one question at a time, how changes in [*specify, for example, market, operational, or financial conditions*] could affect whether we should proceed with a 'go' decision on this proposal [*share or upload*]. Make sure you understand the context of our proposal."

- **Try this:** "Assess how this different scenario [*specify*] could impact resources, timelines, or strategic priorities if we make a 'go' decision on this proposal [*share or upload*]."

- **Try this:** "Help us explore (one at a time) best-case, worst-case, and most likely outcomes and their implications for making the 'go' decision on this proposal [*share or upload*]."

PROMPT FOR TEAM-AI DIALOGUE

Stress-Test a "Go" Decision

You (gen AI) guide our team that includes [*list members*] in exploring what-if scenarios to stress-test the assumptions behind our "go" decision before we vote on this proposal [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Analyze the proposal and summarize in a table with two columns (explicit and hidden assumptions). Wait for our feedback. Then ask us to identify the key assumptions that should hold true for a "go" decision.

[*Step 2*] Based on our input, propose three downside scenarios. Ask us to select which ones we'd like to test.

[*Step 3*] Then simulate the potential impact of the selected scenario on key assumptions and how this could influence the decision.

[*Step 4*] Suggest three ideas for derisking the decision. Wait for our feedback and then summarize.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Facilitate consensus building. Gen AI can suggest questions to the team that help ensure that they share all viewpoints before the collective decision is made. AI also takes notes of live discussion, tracking the areas of agreement, pending issues, and open questions. By summarizing in real time, gen AI keeps the team focused on the decision criteria, making it easier to reach alignment on whether to proceed.

- **Try this:** "Suggest a structured approach to reach consensus on the go/no-go decision about [*specify*]. Then guide us in the reasoning one step at a time."
- **Try this:** "Summarize our discussion so far, highlighting where alignment exists and where concerns remain with regard to the decision [*specify*] we are expected to make."
- **Try this:** "Based on our discussion so far, outline what a 'conditional go' might look like. What must be true for everyone to support the decision?"

After the Go/No-Go Decision Meeting

Gen AI can help teams document outcomes, outline implications, and clarify next steps. In the case of a "no-go" decision, it can help prepare, facilitate, and document a postmortem analysis.

Communicate and explain the decision. Based on meeting transcript or recording, Gen AI can help draft clear communications explaining the rationale behind the decision, ensuring transparency and alignment across all the relevant stakeholders.

- **Try this:** "Draft a summary explaining the decision, the key factors that influenced it, and the reasoning behind it."

- **Try this:** "Create tailored messages for a targeted stakeholder group [*specify*] explaining what the decision means for them and why it matters."

- **Try this:** "Prepare talking points for communicating the decision [*share or upload*] to [*specify audience*] in a tone that is [*specify*]."

- **Try this:** "Anticipate likely questions or concerns from a relevant stakeholder [*specify*] and draft evidence-based responses to address them proactively."

Explore implications of "go" decisions. Gen AI can help the team think through the consequences of a "go" decision across several dimensions such as resources, timelines, and dependencies with other projects that may be affected. It augments the team's ability to consider all potential downstream impacts, helping to anticipate ripple effects and act accordingly.

- **Try this:** "Help us map the functional impact of this "go" decision. How will it affect [*specify functions, for example, operations, finance, product, HR*] in terms of workload, priorities, and resource allocation? Proceed one function at a time."

- **Try this:** "Ask us questions, one at a time, to help us uncover potential dependencies between this approved decision [*specify*] and our ongoing or planned projects [*specify*]. What could be impacted or require coordination?"

- **Try this:** "Guide us, one question at a time, in thinking through how this decision [*specify*] may shift strategic priorities or operational plans for our [*specify team or area*]. What needs to be realigned?"

Conduct postmortem on "no-go" decisions. For rejected proposals, gen AI can help the team reflect on the rationale behind the "no-go" decision, extract key learnings, and share insights to inform future initiatives. Building on best practices, AI can support a constructive review process that values learning over blame.

- **Try this:** "Help us reflect on the key reasons behind the "no-go" decision [*share or upload*]. What assumptions didn't hold? What evidence led us here? Suggest one key reason at a time."

- **Try this:** "Walk us through a postmortem analysis of our proposal [*share or upload*]: What aspects were strong? Where did it fall short? What would we change next time? Proceed one question at a time. Ask for our feedback."

- **Try this:** "Help us reflect by asking questions such as: Could we have recognized earlier that this proposal wasn't viable? What early signals or patterns might we have missed? Proceed one question at a time."

CHAPTER 14

Prioritization Session

As organizations navigate complex portfolios, limited resources, and competing demands, prioritization ensures that energy flows to the work that truly matters. Prioritization can take many forms: portfolio planning to decide which projects to fund, allocating marketing budgets to the most effective channels, selecting ideas from a brainstorming session to move forward, or choosing which customer accounts or prospects to focus on. Whether you're in strategy, product, marketing, or operations, the need to rank and prioritize from a long list of options is a frequent and critical decision-making activity.

Prioritization at a strategic and operational level is often the difference between organizational success and failure.[1] When done well, it brings clarity, focus, and alignment. But many organizations do it badly. You've likely experienced decisions made with no clear criteria. Too many initiatives are kept on the list instead of being trimmed, diluting resource allocation. Sometimes, team members aren't even familiar with the items they're asked to prioritize, lacking context, background, or understanding of the implications. Choices are often not data-driven, relying on gut feelings or internal momentum, while discussions where the loudest voices dominate can become political. Team members sometimes overlook important dimensions. Then, once they set priorities, it's often unclear what logic or process led to the choices, making it difficult to explain or communicate decisions to others. The result is confusion and a lack of focus and alignment.

Gen AI offers practical solutions to address many of these persistent prioritization challenges. It fosters productive prioritization sessions by gathering data on the items to evaluate, aligning the team on the scoring method and processes, consolidating scores, and documenting the rationale behind the final rankings. Beyond productivity, gen AI can elevate the prioritization activity by highlighting overlooked criteria and challenging potential biases in evaluation. It can also help decision-makers understand more deeply the implications of different choices.

TABLE 14-1

How gen AI enhances a prioritization session

Team activity	Before	During	After
Prioritization session	• Summarize items to prioritize • Align on prioritization methods • Design the scoring template	• Consolidate scoring • Challenge the scoring • Calibrate and converge	• Explain the ranking • Reflect on new priorities • Review and fine-tune prioritization methods

Before the Prioritization Session

By helping prepare both the content and the decision dynamics, AI can ensure that decision-makers arrive informed, aligned, and ready for meaningful debate. Instead of walking into the session with scattered inputs, unclear criteria, and personal agendas, they come familiar with the items to prioritize, aligned on how to evaluate them, and ready to engage constructively, grounding the conversation in evidence and a shared understanding about trade-offs.

Summarize items to prioritize. Gen AI helps create a structured briefing for each decision-maker in the prioritization session. The goal is to ensure that everyone understands what's being evaluated, why it matters, and how it connects to broader goals. Facilitators can use AI to generate concise

overviews that highlight the key elements of each proposal—such as objectives, expected impact, resource needs, and risks—making it easier for participants to compare and evaluate them. Decision-makers can also use AI to engage more deeply with the content, prompting it to brief them on specific items conversationally. In addition, AI can answer clarifying questions about submitted proposals, helping resolve doubts before the session.

- **Try this:** "Create a 300-word summary of this proposal [*share or upload*], highlighting the key elements that connect to the company's strategic priorities [*share or upload*]."

- **Try this:** "As in a 90-second elevator pitch, summarize the proposal's core points [*share or upload*], including objectives, expected impact, and key trade-offs."

- **Try this:** "Summarize the differences and similarities of these proposals [*share or upload*] to support a more structured prioritization."

Align on prioritization methods. Prioritization sessions often falter when they lack methodological rigor. By supporting alignment on both what to evaluate and how to evaluate it, AI can help define a structured framework that enhances decision-making. This includes not only defining the criteria—such as impact, feasibility, or strategic fit—but also agreeing on the ranking approach, whether it's voting, scoring, consensus building, or calibration.

- **Try this:** "Generate five evaluation criteria tailored to our strategic goals [*share or upload*], explaining why each criterion is important. Then ask us questions, one at a time, to help us choose the most relevant for our context."

- **Try this:** "Design a scoring rubric that defines what high, medium, and low mean for these criteria [*specify*]. Then generate examples that illustrate different levels (low, medium, high) of each criterion."

- **Try this:** “Explain the most common ranking approaches like [*specify, for example, MoSCoW method, Eisenhower matrix, weighted scoring, 100-point method*] and suggest a structured approach to help us make a selection. Make sure you understand the context of our selection before suggesting the right approach.”

Design the scoring template. Scoring is often when prioritization sessions lose structure; participants interpret and apply criteria inconsistently, they feel overwhelmed by too many options and data points, and they might be biased for or against certain projects or initiatives. AI can help bring consistency and rigor to the evaluation process. Facilitators can create scoring templates with AI and distribute them before the session to capture, consolidate, and compare inputs. At the same time, decision-makers can use AI interactively to guide their own evaluation—reviewing each item, reflecting on criteria one by one, and making informed judgments based on a shared rubric.

- **Try this:** “Create a scoring template for evaluating proposals [*specify*] based on these criteria [*specify*] and this scoring rubric [*share or upload*].”

- **Try this:** “Guide me through this scoring template [*share or upload*], one section at a time, prompting me to reflect on each criterion before assigning a score to this proposal [*share or upload*].”

- **Try this:** “Review my evaluation [*share or upload*] of all proposals and flag any inconsistencies. Wait for my feedback. Then prepare a one-page summary to send to the facilitator as input for the prioritization session.”

During the Prioritization Session

AI helps identify areas of agreement and disagreement, allowing decision-makers to compare their ratings and discuss biases or inconsistencies in scoring patterns, without getting lost in subjective debate. It can also challenge the scoring, simulating alternative perspectives (for example, “How would our customer view this prioritization?”) and prompting critical

questions. Finally, it supports calibration and convergence by guiding the discussion and helping refine rankings.

Consolidate scoring. AI can merge all inputs into a single ranking that accounts for the different weights defined, calculate averages, and automatically flag outliers. AI can highlight areas of consensus and expose major disagreements, helping the group see where alignment already exists and where deeper discussion is needed. By plotting and visualizing scores —such as on a matrix of impact versus feasibility—AI makes patterns visible at a glance. This allows participants to focus their energy on interpreting results and making faster decisions.

- **Try this:** "Visualize the scoring results [*share or upload*] on a 2x2 matrix [*specify, for example, impact versus feasibility*]."

- **Try this:** "Identify areas of agreement and consensus in this scoring document [*share or upload*], and flag where we disagree."

- **Try this:** "Analyze which items show the greatest variance in terms of scoring in this document [*share or upload*], so we can best focus our discussion where it's most needed."

Challenge the scoring. AI can help teams move beyond mechanical scoring by examining results and surfacing blind spots. It can identify potential biases or distortions, such as important criteria being overlooked, or projects receiving unexpectedly high or low scores compared to similar ones. AI can also simulate how changes in criteria and weights impact the rankings, enabling the team to explore trade-offs dynamically and test the robustness of their choices. Additionally, it can simulate how stakeholders who are not present (for example, finance, operations, customers) might score the same initiatives.

- **Try this:** "Analyze the scoring data set [*share or upload*], highlighting the projects whose scores are significantly higher or lower than the category average."

- **Try this:** “Simulate how an evaluator from a different perspective [*specify, for example, finance, operations, or customer*] might score this item [*specify*] and why.”

- **Try this:** “Flag outliers in this document [*share or upload*] and propose follow-up questions to understand the reasons behind their scoring to challenge or validate them.”

Calibrate and converge. AI can support calibration and convergence by segmenting items based on the level of consensus—highlighting those with strong agreement, where discussion is unnecessary, and flagging those with uniformly low scores that can be quickly deprioritized. This allows the team to concentrate on where perspectives diverge and what needs more discussion. By referencing the scoring rubric, AI ensures that prioritization remains grounded in shared definitions and gradually converges.

- **Try this:** “Reference the scoring rubric [*share or upload*] and help us recalibrate this item [*specify*] to ensure that it aligns with our agreed criteria.”

- **Try this:** “For these two similarly ranked projects [*share or upload*], suggest additional criteria or questions to help us decide which one should take priority.”

- **Try this:** “Ask us questions, one at a time, to help us resolve disagreements on this scoring [*specify*].”

- **Try this:** “Suggest a best-practice technique to help us discuss and converge toward a shared decision about [*specify*].”

PROMPT FOR TEAM-AI DIALOGUE

Portfolio Prioritization

You (gen AI) guide our team that includes [*list members*] to prioritize our portfolio of initiatives [*share or upload*], starting from our individual rankings [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Consolidate our individual rankings and highlight key areas of agreement and disagreement. Engage us with reflective questions (for example, “Does anything in these rankings surprise you? If so, why?”).

[*Step 2*] Recap the key areas of disagreement and suggest best practice prioritization techniques to help us resolve differences and converge on a final ranking.

[*Step 3*] Ask us to select one technique. Wait for our answer. Then guide us, one step at a time, in applying the technique to one area of disagreement for our choice.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don’t be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

After the Prioritization Session

By capturing the rationale behind each decision, AI helps create a clear and traceable record—linking scores, criteria, and discussion points into a coherent decision memory. AI also enables reflection on the implications of updated priorities. Finally, it can support a review of the method and criteria used for prioritization, what worked, what didn’t, and can suggest refinements for future sessions.

Explain the ranking. After the team has made decisions, it is essential to explain why they were made. AI can help articulate the reasoning behind each ranking. This strengthens transparency and supports change management, as stakeholders are more likely to accept decisions when they understand the reasoning.

- **Try this:** “Create a decision log that links each ranking [*share or upload*] to the discussion points considered during the session

[*share or upload minutes or recording*].”

- **Try this:** “Draft a memo explaining the ranking to share with stakeholders [*specify*] who weren’t present at the discussion [*share or upload minutes or recording*].”

- **Try this:** “Explain how and why this project or initiative [*specify*] was ranked during the session [*share or upload minutes or recording*].”

Reflect on new priorities. Once the team has set priorities, it’s essential to understand how they affect the team’s plans, responsibilities, and timelines. AI can assist in exploring the implications of what has been given a high priority and what hasn’t.

- **Try this:** “Guide us, one question at a time, to think through what the new priorities [*share or upload*] mean for our current project, activities, and timelines.”

- **Try this:** “Help us analyze, one step at a time, the likely consequences of deprioritizing these initiatives [*share or upload*]. Classify impacts as strategic, operational, or reputational, and suggest ways to communicate and manage stakeholder [*specify*] expectations for each category.”

- **Try this:** “Ask us questions, one at a time, that can help you draft an internal communication explaining the implications of these portfolio decisions [*share or upload*] to [*specify target audience*].”

- **Try this:** “Ask us questions, one at a time, to reflect on how the new priorities [*share or upload*] will affect our team structure, required skills, and focus. List potential gaps and suggest actions to address them.”

Review and fine-tune prioritization methods. Every prioritization session is a learning opportunity. AI can help review the process—what worked well,

where confusion arose, and how the method could be improved for next time—building a culture of continuous improvement.

- **Try this:** "Guide us, one step at a time, through a retrospective to reflect on how the prioritization session [*share or upload minutes or recording*] went and what we could improve. Then propose three concrete improvements for future sessions."

- **Try this:** "Compare this prioritization session [*share or upload minutes or recording*] with prioritization best practices, identify key gaps, and recommend adjustments for next time."

- **Try this:** "Create a short postsession survey [*specify format, for example, three closed- and two open-ended questions*] to send to participants, asking for feedback on inclusiveness of the discussion, decision quality, and overall facilitation."

SECTION FOUR

Ideating in Teams with Generative AI

CHAPTER 15

Ideation Activities That Are Enhanced with Gen AI

Innovation is a strategic imperative that spans every corner of the organization, from generating ideas for new products and services to rethinking internal processes and even entire business models. In most organizations, it extends beyond internal teams. It increasingly involves collaboration with customers, suppliers, and ecosystem partners to ideate solutions that are more relevant, differentiated, and impactful.

Ideation activities—whether brainstorming sessions, hackathons, customer workshops, or innovation workshops—are where ideas take shape and possibilities are explored.

Ideation methods abound, but applying them well requires expertise and disciplined facilitation. Too often, participants rush into an ideation session without clearly defining a problem or a full understanding of the customer's pain points to address.[1] Sessions may lack focus, fail to challenge assumptions, or simply generate too many paper and virtual Post-it notes, without a clear process for filtering and selecting the best ideas. And while coming up with novel ideas is relatively easy, turning them into successful products, services, or business models is far harder. The result is often a burst of creativity that struggles to translate into meaningful outcomes.

TABLE 15-1

How gen AI enhances team ideation activities

Team activity	Before	During	After
Chapter 16: Brainstorming	• Frame the problem • Select a brainstorming technique • Generate food for thought	• Foster divergent thinking • Engage and include teammates • Cluster and rank ideas	• Capture ideas • Nurture ideas • Plan action
Chapter 17: Hackathon	• Plan the event • Establish themes and challenges • Foster team building	• Organize teamwork • Co-develop with AI • Support pitches	• Celebrate and showcase • Follow up on winning projects • Survey participants
Chapter 18: Customer-supplier workshop	• Target the right customers and topics • Design joint journeys • Engage participants	• Align on problems • Co-create solutions • Present and challenge	• Document joint outputs • Select and commit • Create joint action plans
Chapter 19: Business model innovation	• Create a facilitation blueprint • Familiarize participants with methods and tools • Assemble a case library	• Structure the business model • Stress-test the new business model • Explore ecosystem implications	• Validate the plan • Provide synthetic feedback • Iterate and revise

Gen AI helps overcome these challenges. It enhances ideation activities by making them not only more productive, but also more creative, strategically challenging, and meaningful for participants.[2] In this section you will learn how to leverage gen AI for brainstorming, hackathons, customer-supplier workshops, and business model innovation, with

concrete examples of prompts that you can try before, during, and after each session.

CHAPTER 16

Brainstorming

Walk into almost any organization and you'll likely find a team in the midst of a brainstorming session. Marketers refining campaign ideas. Product managers whiteboarding new features. HR leaders rethinking employee experience. For decades, brainstorms have been the go-to method for generating ideas, sparking collaboration, and building buy-in. Done well, they are a springboard for the creative process: first diverging to explore a wide range of possibilities, then converging to focus on the most promising ones.

Despite a wealth of research and guidance on how to brainstorm effectively, many sessions still fall short in practice.[1] Teams sometimes poorly frame questions, leading them to jump straight to solutions without exploring whether they are tackling the right challenge. The way sessions are structured can make things worse.[2] When everyone is expected to generate ideas aloud at the same time, participants may lose their thoughts while waiting to speak or hold back for fear of judgment.[3] Without trust-building or warm-ups, quieter or junior members often remain silent, while extroverted or senior voices dominate the discussion. Even when promising ideas are generated, they can remain scattered and disorganized, or lacking ownership for further development.

TABLE 16-1

How gen AI enhances brainstorming

Team activity	Before	During	After
Brainstorming	• Frame the problem • Select a brainstorming technique • Generate food for thought	• Foster divergent thinking • Engage and include teammates • Cluster and rank ideas	• Capture ideas • Nurture ideas • Plan action

Gen AI streamlines brainstorming activities by capturing and organizing ideas, clustering and ranking contributions, tracking promising leads, and translating concepts into actionable plans. Beyond productivity, it elevates the quality and creativity of team brainstorms by helping frame the right questions, suggesting new perspectives and analogies, and ensuring that all voices, including those of quieter participants, are heard, uncovering hidden opportunities and insights.[4]

Before the Brainstorm

Gen AI helps set the table by framing the right questions before jumping on ideas for solutions, then selecting the most effective ideation techniques, and curating food for thought—stimuli, analogies, or examples—to spark the team's creativity.

Frame the problem. Gen AI supports a comprehensive exploration of an issue and its nuances. By asking exploratory questions, AI helps open team members' minds, widening their perspectives on the various aspects of the problem so they can push past cognitive biases and venture into uncharted territory.

- **Try this:** "Generate five open-ended questions about this problem [*specify*] that help us challenge our view [*specify*]."

- **Try this:** "Help us [*list members and roles*] explore this problem [*specify*] from multiple perspectives and suggest alternative ways to frame it."

- **Try this:** "How can we explore this problem [*specify*] from unexpected angles to extract insights about [*specify*] we might otherwise miss?"

PROMPT FOR TEAM-AI DIALOGUE

Reframe Your Initial Problem

You (gen AI) guide our team that includes [*list members*] through an AI-enhanced question burst about [*specify problem*]. Your goal is to expand our thinking by improving how we frame our problem, not to solve it.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Briefly introduce what the question burst technique is and provide three examples of question types. Ask us to take a few minutes and generate at least two questions individually and share them in the chat.

[*Step 2*] Guide us, one step a time, in the application of the question burst technique starting from our initial list of questions. Stop when we select the questions that feel most promising to us.

[*Step 3*] Reframe our initial problem statement based on our selection and explain how it opens new angles compared to the original formulation.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Select a brainstorming technique. Gen AI helps choose and apply the most appropriate ideation techniques that balance individual and group contributions. For instance, it can recommend question burst, a technique that helps generate many different questions about the problem at hand, or

brainwriting, a technique that invites participants to generate solution ideas individually before sharing with the wider group.[5]

- **Try this:** "First, understand our context by asking three targeted, probing questions about the goals and scope of our brainstorming session. Proceed one question at a time and wait for our feedback. Then suggest two ideation techniques that would be most effective."

- **Try this:** "Briefly explain this technique [*specify, for example, question burst; brainwriting, round robin, the SCAMPER method*] and how it works. Then provide step-by-step guidance on how we can apply it in our team session."

- **Try this:** "Guide us toward brainstorming techniques that are most effective to generate diverse and novel perspectives. Make sure you understand our team context and ideation goal."

Generate food for thought. Better ideas emerge when people are open to new perspectives that stretch thinking beyond familiar patterns. Gen AI helps feed the team's ideation funnel with a curated list of analogies, examples, facts, and perspectives from other domains.

- **Try this:** "Guide us, one step at a time, to identify analogies from unrelated industries or contexts that might inspire fresh approaches to tackle our challenge [*specify*]."

- **Try this:** "Considering our context [*specify*] and problem [*specify*], list 10 examples of innovative solutions or approaches from other organizations, industries, or domains that could inspire or inform our own ideas. Guide us on how each example might be adapted to our situation."

- **Try this:** "Provide five case studies of other companies [*specify types*] tackling a similar problem [*specify*]. For each case, identify key patterns, strategies, or insights that could inform or inspire our own brainstorming session."

During the Brainstorm

During the ideation activity, AI acts as a co-facilitator stimulating creativity; helping enrich, cluster, and rank ideas; and ensuring inclusive engagement so every voice is heard. Also, it can simulate those who are not present in the room (for example, "Act as [*specify*], who cannot join today's brainstorming session. Share three points that reflect their likely perspectives on [*specify*]").

AI AGENTS FOR TEAMS

Agents Can Act as Idea Coaches

As AI ecosystems evolve, we're seeing the rise of specialized agents designed for focused tasks moving beyond the broad capabilities of generalist LLMs. For example, both Microsoft Copilot's Idea Coach and Google Gemini's Idea Generation provide task-oriented AI agents for brainstorming and ideation. Beyond generating ideas, these agents guide users through structured creative processes, suggest tailored ideation techniques, help cluster and prioritize ideas, and support the planning and facilitation of effective brainstorming sessions.

Foster divergent thinking. Gen AI supports the flow of ideas and possibilities. It can guide the team in the application of varied ideation methods, offering prompts, revealing unexpected dimensions, and encouraging exploration beyond the obvious and conventional boundaries.

- **Try this:** "Help us identify assumptions in our current ideas [*share or upload*] and suggest three provocative variations for each idea that push our thinking in new directions. Proceed one idea at a time and wait for our answer."

- **Try this:** "Help us further expand these initial ideas [*share or upload*]. Suggest other angles, dimensions, or connections that we may not have considered. Proceed one suggestion at a time and wait for our answer."

- **Try this:** "Help me, as facilitator, to stimulate divergent thinking by suggesting creative and thought-provoking questions and

perspectives, while still giving each participant space to generate their own original ideas independently."

Engage and include teammates. Gen AI helps ensure that all voices are heard by suggesting slots in the agenda for participants to ideate individually and, during discussion and prioritization, by flagging quieter participants and prompting the facilitator to include their perspectives. It can also simulate absent stakeholders by taking on their role and suggesting what ideas they might contribute.

- **Try this:** "Help us design the brainstorming agenda on [*specify topic*] so that divergent thinking happens first through individual ideation. Ensure that every participant can contribute their own ideas before group discussion begins."

- **Try this:** "Guide the convergence and prioritization phase. Suggest three facilitation techniques that ensure all participants contribute, include quieter voices, and subdue dominant voices."

- **Try this:** "Considering our list of participants [*share or upload*], suggest additional stakeholders who could add valuable perspectives, and explain why they would be relevant. Then help us select the three most important to consider."

Cluster and rank ideas. When teams use AI for ideation, they may end up generating far more ideas that they can reasonably process. AI can help make sense of that abundance by identifying patterns, clustering related concepts, and pointing out gaps. It can also support idea prioritization based on criteria the team defines.

- **Try this:** "Cluster these ideas [*share or upload*] into meaningful categories based on similarity, theme, or potential impact. Summarize each category in one sentence so we can understand overall patterns more clearly."

- **Try this:** "Suggest five criteria for ranking ideas such as feasibility, novelty, and potential value. Wait for our selection. Then use them

to help us rank and prioritize the list of our ideas [*share or upload*].”

- **Try this:** “Flag any gaps or underexplored areas in our list [*share or upload*] and suggest directions for further exploration.”

PRACTICAL TOOLS FOR BRAINSTORMING

While we often picture team brainstorming sessions as physical gatherings with sticky notes and high-touch facilitation, today’s digital tools offer enhanced ideation and creative experiences. AI-powered digital whiteboards, such as Miro, Mural, or Microsoft Whiteboard with Copilot, now support teams with intelligent features like suggest, categorize, and summarize ideas.

After the Brainstorm

After the team brainstorming session, gen AI supports capturing and documenting all ideas and their rationale, nurtures the most promising ones, and assists the team in translating them into concrete action plans.

Capture ideas. Gen AI acts as an *idea context keeper*, recording not just the ideas themselves, but also the reasoning behind them, who proposed them, and any relevant examples or comments formulated during the team discussion.

- **Try this:** “Help us log each idea into a table, noting its origin, the rationale behind it, and any examples or references mentioned during the discussion [*share or upload recordings/transcriptions*].”

- **Try this:** “Flag three ideas from the list [*share or upload*] that might need further validation or research before moving forward. Explain the rationale of your selection. Then proceed one idea at a time and ask for our further contribution.”

- **Try this:** “Support us in creating a concise, shareable report [*specify format and target audience*] that captures both the ideas and the

reasoning behind them [*share or upload recordings or transcriptions*].”

Nurture ideas. Most teams come up with good, promising ideas, yet they lack effective, organized approaches to review, enrich, and expand them. Gen AI helps prevent ideas from going unreviewed, leaving major value untapped. It identifies connections and suggests ways to combine, reshape, or elevate concepts for greater impact.

- **Try this:** “Help us revisit our ideas [*share or upload*] and suggest ways to enrich or enhance them, for example, by combining related concepts or adding new features.”

- **Try this:** “Help us expand promising ideas [*share or upload*] into more concrete, detailed, and actionable solutions for testing or prototyping. Proceed one idea at a time. Make sure you understand the idea before making your suggestions.”

Plan action. Tackling a challenge or solving a problem requires a team to come up with an idea that works and can be executed. Gen AI helps turn ideas into action by supporting the identification and planning of key activities to make the idea more concrete and testable in the real world.

- **Try this:** “Guide us, one step at a time, to build an action plan for this idea [*share or upload*] that outlines workstreams, activities, timelines, milestones, and measurable outcomes.”

- **Try this:** “Suggest quick ways to test or prototype the most promising ideas [*share or upload*].”

CHAPTER 17

Hackathon

Hackathons are team-based activities where participants collaborate intensively, typically over a day or several days, to generate, prototype, and present solutions to specific challenges. Traditionally rooted in the software industry, hackathons are no longer just for coders—they have evolved into a versatile format for organizations seeking to accelerate problem-solving, foster crossfunctional collaboration, and drive cultural change.[1]

Modern corporate hackathons bring together employees from IT, marketing, operations, HR, finance, and more. They often include external partners, startups, or even customers to broaden perspectives and unlock novel solutions.[2] A bank might run a hackathon to redesign its customer onboarding experience.[3] A hospital, to streamline patient intake or improve staff scheduling. A retailer, to rethink store layouts or sustainability initiatives. Even HR departments now use hackathons to reinvent hiring practices, onboarding programs, or diversity strategies. In short, any organization facing a complex challenge, from supply chain bottlenecks to workplace culture change, can adapt the hackathon format to spark new ideas and rapid experimentation.[4] When successful, hackathons help organizations test ideas quickly and cheaply, foster collaboration across departments, boost employee engagement, and reveal hidden insights that might otherwise go unnoticed.

Yet, despite their promise, hackathons are not a guaranteed recipe for innovation. Management research and real-world experience reveal some common pitfalls that can undermine even the best-intentioned event.[5] Vague or misaligned challenges often result in teams pursuing ideas that lack

strategic relevance or feasibility. The absence of effective mentoring can leave participants without the guidance needed to overcome obstacles or refine their solutions. Teams that are not thoughtfully composed, lacking a mix of skills and perspectives, may struggle to collaborate productively or generate creative outcomes. Many hackathons also suffer from insufficient support for pitch preparation, making it difficult for promising ideas to be communicated clearly and persuasively to the jury. Unclear judging criteria further exacerbate this issue, leaving participants uncertain about how their work will be evaluated. Finally, without a structured plan for post-event follow-up, there is a risk that hackathons become symbolic exercises rather than genuine drivers of innovation.

TABLE 17-1

How gen AI enhances hackathons

Team activity	Before	During	After
Hackathon	• Plan the event • Establish themes and challenges • Foster team building	• Organize teamwork • Co-develop with AI • Support pitches	• Celebrate and showcase • Follow up on winning projects • Survey participants

Gen AI can streamline hackathons by supporting event planning, forming teams, drafting communications to showcase outcomes, and tracking follow-ups on winning projects. Beyond improving productivity, gen AI can take an active role during the hackathon. It can act as a facilitator, guiding teamwork organization and approaches; as a co-developer, supporting ideation and prototyping; and as a pitch coach, helping teams craft persuasive presentations.

Before the Hackathon

Gen AI collaborates with the hackathon planning team across a wide range of activities. It can assist with logistical aspects and also act as a methodological expert in crafting open-ended challenge statements that

foster creative exploration. When teams are formed before the event, gen AI can also make suggestions for optimal team composition.

Plan the event. Gen AI helps the organizing team to clarify objectives, anticipate logistics, design a detailed agenda tailored to goals and participants, and support the communications about the event.

- **Try this:** "Ask us one question at a time about our goals, themes, number of participants and backgrounds, and available time. Wait for our answers. Then help us build a detailed hackathon agenda. Include registration, icebreakers, keynote, hacking sessions, mentoring slots, meals, judging, and awards. Provide timing and a short rationale for each segment."

- **Try this:** "Review our hackathon draft agenda [*share or upload*] and suggest methodological improvements based on best practices."

- **Try this:** "Help us design a participant guide [*specify format*]. Before drafting it, ask us clarifying questions, one at a time, about our audience, the event format, judging criteria, and tone we want."

- **Try this:** "Act as a communications expert and guide us, one step at a time, to draft the marketing and communication plan for our hackathon."

Establish themes and challenges. The best hackathons start with an open-ended but clear challenge, such as: "How might we help our sales team interact with contacts more effectively?"[6] Gen AI helps the planning team define challenge statements in the form of questions that are aspirational, without prescribing a likely solution.

- **Try this:** "Help us define a hackathon theme that aligns with our business priorities [*specify*]. First, ask us clarifying questions, one at a time, and based on our answers suggest five potential themes."

- **Try this:** "Based on the theme [*specify*], support us in drafting a hackathon challenge statement of [*specify length*] that is

aspirational and aligned to our strategy [*share or upload*]. Once we have a draft, help us critically review it."

- **Try this:** "Provide examples of well-defined hackathon challenges for similar topics that we could adapt for our event on [*specify theme*]. Outline the key dos and don'ts we should follow when designing our challenge."

Foster team building. Diverse, balanced teams invigorate and inspire idea development. Gen AI helps build optimal teams and assists participants in connecting before the event.

- **Try this:** "Help us define the rules and criteria for forming hackathon teams. Ask us key questions, one at a time, about skills, departments, diversity, experience, and mentorship roles. Wait for our answers, then draft clear guidelines to ensure fairness and alignment with our goals."

- **Try this:** "Review the list of formed teams [*share or upload*]. Guide us, one step at a time, to discuss any imbalances or potential gaps. Then suggest regrouping options that increase diversity of skills and experiences."

- **Try this:** "Help us design a practical guide for hackathon participants, based on proven hackathon best practices. Include concrete examples and practical tips for integrating AI tools during the ideation process. Before you start, make sure you understand the context of our hackathon."

During the Hackathon

Hackathon participants now have access to a new team collaborator. They can leverage AI to organize their teamwork (breaking down challenges, distributing tasks, and managing time under pressure), to accelerate prototyping (generating code, explaining technical concepts, and helping build demos or apps), and to rehearse and strengthen their final pitch (crafting the narrative, creating visuals and demos).

Organize teamwork. Teams can leverage gen AI as a team member who collaborates with them on how to break down the challenge, allocate tasks, and structure the work to reach their goal under time pressure.

- **Try this:** "Guide us [*list members and expertise*] in breaking down the challenge statement [*share or upload*] into clear tasks, assign responsibilities for both individual and group work, and suggest how to schedule our team check-ins. Proceed one step at a time and wait for our answers."

- **Try this:** "Suggest where and how gen AI [*specify model*] can be incorporated into our team activities as we work on [*specify the challenge statement*]. Wait for our feedback, then create ready-to-use prompts that we can run with AI to jump-start our teamwork."

- **Try this:** "Help us define a work plan for [*specify the challenge statement*] that identifies specific opportunities where gen AI can assist, describing the type of support. Provide this work plan in table format."

PROMPT FOR TEAM-AI DIALOGUE

Organize and Structure a Hackathon

You (gen AI) act as a hackathon facilitator and guide our team [*list members*] through organizing our work around this challenge [*share or upload*], knowing that we only have [*specify time*] available.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us, one at a time, to introduce ourselves and describe what type of contribution we can bring. Wait for our answers, then ask if we have any hackathon experience that involved working with AI.

[*Step 2*] Guide us, one question at a time, in breaking down the challenge into actionable tasks. For each task, help us discuss what needs to be done and by whom, considering our types of contribution.

[*Step 3*] List all the tasks and assigned responsibilities. Wait for our validation. Suggest where checkpoints are needed to ensure team alignment and explain the rationale.

[*Step 4*] Help us plan where and how gen AI can be integrated into our tasks. For each task, suggest whether gen AI should act as a productivity assistant (for example, drafting, coding, summarizing) or a Co-Thinker (for example, brainstorming, challenging assumptions), providing concrete examples.

[*Step 5*] Summarize our workflow in a table format: what (tasks and checkpoints), who is responsible, timing, and how to use gen AI, including two ready-to-use prompts.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Co-develop with AI. Gen AI supports hackathon teams by boosting and accelerating the creation of demos, apps, and websites. It can explain technical concepts, guide teams through unfamiliar steps, and "vibe-code" to speed up prototyping. Teams explain what they want to build, what AI should do, and what "good" looks like, then AI generates the code and helps them refine it.[7]

- **Try this:** "Help us understand how gen AI can support us in developing a working prototype [*specify demo, app, agent, etc.*]. Then guide us step-by-step, waiting for our feedback before proceeding to the next step."

- **Try this:** "Guide us, one question at a time, to evaluate different technical prototyping approaches for [*specify challenge*], outlining the pros and cons in a table so we can make an informed decision as a team."

- **Try this:** "Act as [*specify*] and suggest ways to troubleshoot and debug our prototype [*share or upload*] walking us through possible solutions."

A GEN AI–ENHANCED HACKATHON AT COLLÈGE DES INGÉNIEURS

Collège des Ingénieurs organized a series of gen AI–enhanced hackathons in collaboration with large companies from the retail, aerospace, transportation, and chemical sectors.[a] Over 40 MBA participants formed eight cross-functional teams to tackle real business challenges, from analyzing customer reviews, to developing a sales-support agent, to building a training bot. Teams used AI throughout the entire process of solution development, from problem framing, to generating user journeys and solution architectures, to prototyping. In their final pitch, each team was requested to explain how they used AI at every stage.

Participants used gen AI as a Co-Thinker to widen the solution space and as a solution co-developer (leveraging AI capabilities in coding) to create a cadence of "build-show-adjust." Teams shipped solutions earlier and spent more time validating assumptions.

Professors Hervé Baratte and Jimmi Normann Kristiansen noted that "the teams moved from idea to product concept very quickly. By leveraging AI, they already had a working prototype at day one to share with the client for feedback, something that wouldn't have been possible in the past."

a. Collège des Ingénieurs, "AI as Co-Thinker and Co-Builder," n.d., https://cdi.eu/ai-as-co-thinker-and-co-builder.html.

Support pitches. Gen AI helps teams prepare and deliver compelling pitches. It can guide in structuring their presentations; developing supporting materials such as demos, conceptual visuals, or situational videos (if multimodal features are available); and crafting an engaging narrative. It can also help teams decide how to split the presentation among members for a smooth, dynamic delivery. By referencing best practices and simulating the jury, gen AI ensures that the pitch meets the judging criteria, resonates with the audience, and anticipates tough questions from judges.

- **Try this:** "Suggest how to structure our pitch [*specify duration*] for [*share or upload*], ensuring that it's clear, engaging, and aligned with the judging criteria [*specify*]. Then suggest how we can split

the presentation between team members [*list members*] for an effective delivery."

- **Try this:** "Guide us, one step at a time, in creating supporting materials [*specify format*] to make our pitch [*share or upload*] more compelling."

- **Try this:** "Act as the jury [*specify members*] for our hackathon pitch and list five questions judges might ask about our solution [*share or upload*]. Wait for our feedback. Then help us prepare relevant, concise answers."

After the Hackathon

Once the competition ends, gen AI helps the planning team communicate achievements effectively, secure follow-up on winning ideas, and extract learnings from participant feedback.

Celebrate and showcase. Recognition and storytelling are critical for reinforcing a culture of innovation and sharing success. Too often, hackathon celebrations are generic or fail to reach the right audiences, and the story of the hackathon's impact is lost. Gen AI can help tailor communications for different stakeholders, draft speeches for jurors, and translate technical solutions into accessible language for broader audiences.

- **Try this:** "Help me, as a juror of the hackathon [*specify*], draft a final speech that recognizes all contributors and explains the spirit of the event. Ask me questions to better understand the context and key messages."

- **Try this:** "Create a summary [*specify format*] of the winning projects [*share or upload*] in clear, nontechnical language for companywide communications."

- **Try this:** "Provide best-practice examples for amplifying hackathon success in external communications to grow our brand equity."

Follow up on winning projects. A common pitfall of hackathons is losing momentum after the event, with promising ideas stalling due to lack of an actionable plan or ownership. Gen AI can help organize project documentation, identifying key stakeholders, outlining a follow-up plan, and ensuring that winning projects have a path to further development and implementation.

- **Try this:** "Draft a follow-up meeting invitation for winning teams and key stakeholders, including next steps [*specify*]."

- **Try this:** "Help us outline a high-level plan for further developing our winning project [*share or upload*]. Guide us, one step at a time, to define the key milestones, clarify what success looks like, and list the main resources or support we'll need to move forward."

- **Try this:** "Based on hackathon best practices, suggest ways to connect winning teams with mentors, sponsors, or business units for continued support."

Survey participants. Feedback is routinely collected after hackathons, but rarely analyzed or acted upon, missing opportunities for learning and improvement. Gen AI can design targeted, engaging surveys for different participant groups, analyze responses, and derive insights and learnings.

- **Try this:** "Based on best practices design a concise, engaging survey for [*specify target, for example, participants, mentors, judges, organizers, partners*] to capture their experiences at the hackathon."

- **Try this:** "Analyze survey responses [*share or upload*] and identify key patterns. Ask for our feedback. Then generate a summary report for [*specify stakeholder*]."

- **Try this:** "Guide our discussion, one question at a time, to reflect on the learnings from the survey [*share or upload*]. Then suggest the most important lessons learned. Suggest ways to incorporate these insights into the planning of future hackathons."

AI AGENTS FOR TEAMS

Surveys

AI agents are simplifying how surveys are created, distributed, and analyzed. Tools like Microsoft 365 Copilot and Google Gemini include survey agents that support this end-to-end process. They help design questions, manage distribution across channels like email or chat, and monitor progress. After responses are collected, the agent summarizes key findings, identifies patterns or anomalies, and generates structured outputs.

CHAPTER 18

Customer-Supplier Workshop

In complex value chains, customers and suppliers rely on each other to innovate, improve, and remain competitive. One of the most effective ways to foster this collaboration is through customer (or supplier) workshops: structured sessions where representatives from both organizations come together to share insights, explore opportunities, and co-create solutions. Whether you're a supplier gathering customers to better align your offerings with their needs or a buyer inviting a key supplier to collaborate on future developments, these workshops are unique opportunities to bring together diverse experts for joint innovation.

When executed well, these workshops deliver significant value. They deepen understanding of customers' and end-users' needs, lay the foundations for joint development of new concepts and prototypes, and help mitigate risks early. They help reduce market research costs by testing ideas directly with stakeholders. In B2B contexts especially, the trust and intimacy built through side-by-side collaboration often lead to stronger partnerships and more resilient supply chains.

Despite their potential, many workshops fall short. Common traps include defining the problem statement from only one side's perspective, which can lead to disengagement, or misaligned time horizons, with one party focused on quick wins and the other aiming for long-term transformation.[1] Additional risks arise when key stakeholders are absent or unprepared, when processes or criteria for turning ideas into action are

unclear, or when intellectual property boundaries are gray. In addition, the use of internal jargon instead of a shared language can erode empathy and trust, making genuine collaboration difficult.

Gen AI helps set the agenda and choose topics, designing the workshop journey, documenting results, and translating them into a clear action plan. Beyond productivity gains, it strengthens the workshop's strategic impact by helping frame the joint problem and guiding co-creation of solutions, turning raw ideas into structured, actionable concepts. It helps in constructive critique, helping teams focus on solution relevance for both parties, ultimately generating tangible joint value.

TABLE 18-1

How gen AI enhances customer-supplier workshops

Team activity	Before	During	After
Customer-supplier workshop	• Target the right customers and topics • Design joint journeys • Engage participants	• Align on problems • Co-create solutions • Present and challenge	• Document joint outputs • Select and commit • Create joint action plans

Before the Workshop

Gen AI helps set the table for effective and efficient collaboration with your customer or supplier. It helps frame shared challenges that spark mutual interest, design a tailored co-creation activity, and prompt early reflection so each party arrives aligned and ready to contribute.

Target the right customers and topics. Gen AI helps the team in discussing the most relevant and appropriate customers or suppliers. Then it supports the process of selecting shared topics of interest that both parties want to explore together.

- **Try this:** “Guide us, one step at a time, to help us identify which customers are the best fit for a workshop on [*specify*] based on criteria like shared value, innovation leadership, cultural fit, history of collaboration, and potential impact across business units.”

- **Try this:** “Help us map the stakeholders to involve in the activity and how to secure buy-in and commitment. Wait for our feedback. Then guide us in the selection, considering expertise, decision-making authority, internal influence, and ability to build trust across teams.”

- **Try this:** “We are organizing a workshop with [*specify company*] on [*specify topic*]. Ask three probing questions, one at a time, to define an area that matters to both sides.”

- **Try this:** “Reframe our internal priorities [*specify priorities*] in a way that resonates with the customer’s perspective [*specify customer*].”

- **Try this:** “Help us [*specify company*] see the problem from the other party’s point of view [*specify*]. Guide us in understanding how they experience the issue, what matters most to them, and how that should influence our own thinking.”

PROMPT FOR TEAM-AI DIALOGUE

Team Discussion to Select Joint Topics of Interest for a Workshop

You (gen AI) act as an expert facilitator guiding our team that includes [*list members*] through selecting topics in this list [*share or upload*] for a workshop with [*specify customer or supplier*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to briefly explain the goal of the workshop. Wait for our answer. Then suggest five criteria for evaluating topics (for example, strategic relevance, feasibility, value for both parties, potential impact), considering both parties (customer and supplier). Wait for our selection.

[*Step 2*] Map the complete list of topics proposed by each party. Then identify similarities and differences in perspective between customer and supplier. If you miss any information, ask us who proposed what.

[*Step 3*] Review the list of topics and suggest a selection of three, based on criteria defined in step 1.

[*Step 4*] Take the perspective of [*specify customer or supplier*] and challenge our selection, explaining the rationale.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Design joint journeys. Gen AI supports the joint workshop preparation team (also including some representatives from the customer or supplier) in designing a tailored co-creation activity balancing discovery, ideation challenge, and prioritization, while also helping the team anticipate and manage issues such as intellectual property and confidentiality considerations.

- **Try this:** "Help us [*specify company*] design the workshop with [*specify other company*] on [*specify topic*]. Guide us, one step at a time, in selecting the right participants' profiles, shaping an engaging agenda, and identifying what input or preparation is needed from each side."

- **Try this:** "Provide us with suggestions and best practices to design a compelling workshop agenda, considering the type of customer we're working with [*specify*] and the topic in scope [*specify*]. Wait for our feedback. Then for each section of the agenda, help us design appropriate templates."

- **Try this:** "Act as our legal team and simulate what they are likely to say in a meeting with us about confidentiality, data sharing, and

intellectual property considerations for the upcoming workshop [*share or upload agenda*], based on its agenda, topics, and expected outputs."

Engage participants. Gen AI supports effective preparation by driving early engagement and alignment. It can brief participants on workshop goals, the agenda, and main topics. Also, it can ask participants questions about their role and expectations, ensuring that they enter the workshop ready to contribute, in terms of both content and process.

- **Try this:** "Draft three ready-to-use prompts for each function [*specify*], so participants reflect with gen AI on their role, expectations, and what they need to contribute, given the workshop agenda [*specify*]."

- **Try this:** "Generate an engaging briefing message for [*specify stakeholder*] that explains the workshop's goals [*specify*], agenda structure [*share or upload*], and what participants should prepare in advance."

- **Try this:** "Guide us in creating three self-reflection questions that help participants connect their expectations to the workshop topics [*specify*]."

During the Workshop

Gen AI help customers and suppliers gain a shared understanding of the problem from both parties' perspectives, setting the stage for a co-created solution. It can play the role of devil's advocate to critique the proposed solutions, fostering team alignment and making the solution more robust.

Align on problems. Rather than jumping to solutions, the focus of your workshop should begin with uncovering real pain points, unmet needs, and strategic tensions from both the customer and the supplier perspectives. Gen AI supports this process by helping the facilitator balance contributions and participation, guiding deeper inquiry and structuring the free flow of

opinions and insights. The goal is to turn fragmented inputs into a shared problem definition that sets the stage for joint solution.

- **Try this:** "Help us explore and understand the problem space [*specify topic*] by asking us questions, one at a time, on pain points, unmet needs, and frustrations. Then support turning our answers into a clear problem statement."

- **Try this:** "Evaluate who's contributing to the discussion so far and suggest who is dominating, so we can have both customer and supplier views of the problem."

- **Try this:** "Capture and cluster the inputs from the discussion on the problem so far. Wait for our feedback. Then suggest overlooked dimensions we have not covered."

- **Try this:** "Summarize our discussion so far on the problem space, reflecting both the customer and the supplier perspectives. Ask us questions, one at a time, to ensure that both sides are aligned on the summary."

Co-create solutions. Once both parties reach agreement on the problem to solve jointly, it is time to shift to co-creation mode. Divided into small, crossfunctional teams, participants work together to generate ideas. Gen AI guides idea development and helps teams move from raw brainstorming to structured, actionable concepts.

- **Try this:** "Act as a facilitator for our group discussion on [*specify problem or challenge*]. Ask us one question at a time to help us generate ideas for solutions."

- **Try this:** "Help us make sure both the customer and the supplier contribute actively during the session. Suggest how to prompt quieter voices and ask questions that encourage each side to share their views, ideas, and concerns."

- **Try this:** "For each selected idea [*specify*], ask us questions, one at a time, about key dimensions such as the likelihood of success, the

value it would create for both organizations, who would benefit and how, the associated risks and uncertainties, and how each organization could contribute to its implementation. Then summarize in [*specify format*].”

Present and challenge. Gen AI can support each breakout group in preparing and rehearsing for their idea presentation. It can also assist with structured critique techniques.

- **Try this:** “Help us structure our team’s presentation, moving clearly from the problem statement [*specify*] to the proposed solution [*specify*] and its expected benefits for both parties.”

- **Try this:** “Ask us three challenge questions, one at a time, that test whether the proposal [*share or upload*] is realistic, valuable, and aligned with both organizations’ goals. Then summarize in [*specify format*].”

- **Try this:** “Help us stress-test our idea [*specify*] by playing the role of a skeptical stakeholder from each side [*specify customer and supplier*]. Simulate one stakeholder at a time: What concerns or blind spots might they raise?”

After the Workshop

Gen AI captures and structures workshop outputs, tailors documentation for different stakeholders, and supports joint prioritization. By turning ideas into actionable plans with clear owners, milestones, and shared metrics, gen AI ensures discipline and momentum after the workshop.

Document joint outputs. Gen AI improves the speed and quality of workshop documentation by consolidating notes and other materials produced during the workshop and analyzing recordings and transcripts of discussions. It can produce abridged versions of the workshop output, tailored to each organization, function, and stakeholder. It also enables interactive engagement with documentation by generating probing questions, turning

static summaries into dynamic tools for continued dialogue and joint solution development.

- **Try this:** "Based on workshop materials [*share or upload notes, visual records, etc.*] create a clear, structured [*specify format*] document that captures the problem, the proposed solutions, and the expected benefits for both organizations."

- **Try this:** "Based on workshop notes [*share or upload*], create a customized summary for each stakeholder [*specify stakeholder role and company (customer or supplier)*], so content is relevant to their role and priorities."

- **Try this:** "Act as [*specify*] and challenge the clarity and readability of the documentation [*share or upload*], rephrase jargon, and make the language more accessible."

Select and commit. Gen AI supports joint prioritization and mutual commitment to next steps. Gen AI can help the group work through a feasibility–impact prioritization matrix, guiding both companies to align on evaluation criteria before selecting the top projects to move forward. It can streamline the process of narrowing down ideas to a short list of two or three projects. Gen AI can help draft agreements for senior stakeholders to formalize decisions and launch initiatives, and it can set up a shared monitoring framework to prevent divergence after the workshop.

- **Try this:** "Guide us, one step at a time, to apply a feasibility–impact prioritization matrix with criteria aligned between both companies. Wait for our feedback. Then rank the proposals [*share or upload*] accordingly."

- **Try this:** "Facilitate our joint discussion on the project ideas developed together [*share or upload the list*]. First, help us find agreement on which projects to advance together (differentiating between joint activities within existing resources and new ones requiring additional resources). Second, which to pursue

individually. Third, which to drop. Proceed one step at a time and wait for our feedback."

- **Try this:** "Challenge our prioritization [*share or upload list of prioritized projects*] and ask us to defend each choice with strong, evidence-based rationale and arguments. Proceed one project at a time."

- **Try this:** "Summarize the outcomes of our prioritization discussion so far into a memo that we can share with senior decision-makers [*specify*]."

Create joint action plans. Gen AI helps build a shared road map that sustains collaboration beyond the workshop. It can help translate concepts into concrete plans, specifying who does what, required resources, and key milestones. Gen AI can also guide the setup of follow-up processes, including review points and progress tracking, and help define what success looks like in the short and long terms, supporting the team in building a shared path to achieve it.

- **Try this:** "Guide us in drafting a joint action plan for this project [*share or upload*] with main activities, milestones, roles, and responsibilities for both organizations (customer or supplier). First create a high-level draft and ask for our feedback. Then detail further."

- **Try this:** "Act as our customer [*specify*] and simulate what success looks like for both organizations based on this action plan [*shared or upload*]."

- **Try this:** "Help us design a postworkshop follow-up cadence, clarifying how often to meet, who should be involved, and key responsibilities drawing on good practices, typical pitfalls, and practical tips. Proceed one step at a time, waiting for our feedback."

CHAPTER 19

Business Model Innovation

For decades, organizations relied mainly on research and development teams to create new products or improve existing ones. But in fast-moving markets, product innovation alone rarely sustains an advantage. Increasingly, the most successful organizations are innovating not just what they offer but how they operate, experimenting with new business models. These shifts can be seen across industries, from subscription-based models in entertainment, to mobility-as-a-service in transportation, to digital-first platforms in financial services. To support this shift, a range of practical tools has emerged. For example, the business model canvas, the four-box model, and the business model navigator's cards are among the most widely used.[1] They help teams quickly visualize their current model, explore new patterns, and test assumptions.

When well designed, business model innovation activities can be genuinely transformative. Unfortunately, many still fall short. Teams often apply the frameworks mechanically, without questioning the deeper assumptions that underpin their models. Others may overload the frameworks with excessive detail, which can obscure the bigger strategic picture and make it difficult to grasp the essence. And often, teams get so focused on the idea itself that they overlook whether it's financially viable or practically feasible. In some cases, critical cross-functional stakeholders are absent, leaving insights fragmented and siloed.

Gen AI helps curate relevant case libraries, illustrate methods and tools, fill templates based on real-time team discussion, and document plans for validation and review. Beyond improving the productivity of these sessions, it elevates teamwork by stress-testing proposed new business models, simulating user feedback to validate or disprove key hypotheses, and assessing implications on other players in the ecosystem.

TABLE 19-1

How gen AI enhances business model innovation

Team activity	Before	During	After
Business model innovation	• Create a facilitation blueprint • Familiarize participants with methods and tools • Assemble a case library	• Structure the business model • Stress-test the new business model • Explore ecosystem implications	• Validate the plan • Provide synthetic feedback • Iterate and revise

Before the Session

In the preparation, it's important to focus both on the innovation process and on the content. Helping the facilitator (who is typically part of a dedicated organizing team) select the right framework and ensuring that participants are familiar with it is essential. But even the best-designed method can fall short if it's not supported by the right content: relevant data, contextual insights, and examples that spark lateral thinking. Gen AI supports both dimensions: It helps facilitators and participants become familiar with the methodology, understand how the tools work, and engage with curated content—data points, case studies, and customer insights—that set the stage for deeper conversations.

Create a facilitation blueprint. Gen AI can engage the organizing team in a conversation, as an expert facilitator would do, and guide them through selecting the most suitable method and creating a well-structured activity.

- **Try this:** “Guide us, the organizing team, in the identification of the most appropriate business model innovation method based on our goals and scope. Ask us one question at a time; then help us decide.”

- **Try this:** “Work with us, the organizing team, to design a detailed, time-sequenced agenda for a [*specify, for example, half-day or full-day*] business model innovation workshop. First, ask about participants, scope, approach, and desired outcomes. Wait for our feedback. Then generate an agenda with breakout sessions and stress-testing blocks.”

- **Try this:** “Help refine and finalize this business model innovation workshop agenda [*share or upload*] by checking for missing elements, suggesting best-practice timings, and ensuring alignment with the chosen method [*specify*].”

Familiarize participants with methods and tools. Gen AI helps ensure that participants arrive prepared. It acts as an interactive guide, helping participants quickly grasp the key steps, concepts, and tools of the selected methodology. By asking targeted questions and providing examples or scenarios, AI helps participants reach a shared understanding ahead of the meeting.

- **Try this:** “Explain how this method [*specify*] can be applied in teamwork at the workshop.”

- **Try this:** “Provide three interactive prompts that participants can run with AI to familiarize themselves with the [*selected methodology*], allowing them to explore, apply, and test their understanding before the teamwork.”

- **Try this:** “Provide three relevant industry [*specify*] examples showing how this method [*specify*] has been applied successfully to innovate business models. Ask us two questions about our context that can help you select the examples.”

Assemble a case library. Gen AI can analyze dozens of cases and help select the most relevant examples tailored to context. In addition, it can guide participants interactively, helping them navigate the list of examples, find useful comparisons, look into unexplored areas, and extract insights in preparation for the activity.

- **Try this:** "Create a case library of 20 business model examples for our upcoming workshop on [*specify*]. Ask one question at a time to clarify industry focus, scope, goals, and participant profiles. Based on our answers, compile a diverse and well-structured list of cases. For each case, include a short summary, source, and verified link."

- **Try this:** "List three copy-paste prompts I, as facilitator, can use with AI during the activity to interactively filter the case library [*share or upload*]."

- **Try this:** "Guide me interactively through the case library [*share or upload*] by asking questions about my role, goals, and focus areas. For each example we will explore, summarize key takeaways and insights I can use at the business model innovation workshop."

During the Session

Gen AI can support and enhance both facilitators and participants in business model innovation sessions. It acts as a sort of "digital twin" of the human facilitator, especially during breakout sessions, guiding step-by-step application of methods and tools, helping participants with questions, examples, and real-time feedback. For participants, it can join the discussion by simulating stakeholder reactions that stress-test initial ideas and challenge assumptions across customer value, operational feasibility, and financial viability.

Structure the business model. Applying tools like the four-box model or the business model canvas can be challenging, especially when teams are applying them for the first time.[2] Gen AI can act as a real-time methodological guide. Participants can ask clarifying questions, and AI

provides examples, tips, and suggestions to help complete the model or template.

- **Try this:** "Guide our team, one step at a time, through completing the [*specify, for example, business model canvas*]. For each step, provide two or three examples from [*specify industry or sector*], and suggest ideas to jump-start our discussion."

- **Try this:** "Based on the strategic directions we've discussed so far, create two versions of our future business model canvas: one incremental and one more disruptive. Then ask us three questions to help us compare and debate."

- **Try this:** "Guide us through each canvas block [*share or upload the business model canvas*], one block at a time, asking two challenging questions like 'What's the unique value here?' or 'How does this cost structure support the delivery model?'"

- **Try this:** "This is our completed canvas [*share*]. Help us prepare for the presentation by summarizing the key points related to the value proposition, delivery model, and profit formula."

HOW AI CAN ENHANCE BUSINESS MODEL INNOVATION

In a series of in-person workshops, 50 managers from 13 companies across diverse sectors—including fashion, energy, postal services, life sciences, automotive, health care, technology, and consulting—explored how AI can enhance the application of platform thinking, a business model innovation method developed by Daniel Trabucchi and Tommaso Buganza, professors at PoliMi Graduate School of Management.[a]

The professors developed a custom GPT acting as a "digital twin" of their book *Platform Thinking* to help participants apply their approach for business model innovation. "We can't facilitate and support all 13 teams in parallel, so the GPT acts as a methodological expert guiding each team and challenging their thinking throughout the framework."

The custom GPT was designed as an interactive thought partner, not simply answering questions but engaging in a dialogue, offering explanations, tips, and case examples, and stimulating reflection on strategic questions and overlooked options.

By working alongside the custom GPT, teams learned to apply the framework to their organizational challenges. "At first, we used it like a search engine," one

participant noted, “but soon we realized it could help us think better—not just find information.”

A feedback survey of the workshops showed that most teams found that this AI-supported approach enhanced the quality of their discussions, while reducing typical risks of using AI individually, such as too much trust or conformity.[b] It also increased engagement and collaboration throughout the learning journey.

a. Daniel Trabucchi and Tommaso Buganza, “Platform Thinking,” https://platformthinking.eu/.

b. Daniel Trabucchi and Tommaso Buganza, “Gen AI and Platform Thinking,” *Platform Thinking Magazine* 3, https://polimi.eu.qualtrics.com/CP/File.php?F=F_auayvQnIfzl51Ur.

Stress-test the new business model. A promising business model must be challenged from multiple angles. Gen AI simulates reactions from different stakeholders (customers, competitors, partners, etc.) and pretests the model’s strength across three dimensions: customer value, operational feasibility, and financial viability. It can also help unearth hidden assumptions that haven’t been discussed but could derail the model if proven wrong. AI can also help teams prepare their key messages for the presentation phase and anticipate potential objections.

- **Try this:** “Review our proposed business model [*share or upload*] and take the perspective of [*specify, for example, executive, competitor, customer*] to identify potential objections or challenges, suggesting ways to address them.”

- **Try this:** “Guide us through evaluating the model’s operational feasibility, prompting us, one step at a time, to consider challenges and opportunities.”

- **Try this:** “Help us uncover hidden assumptions on [*specify which section or element of the business model*] by asking five probing questions, one at a time.”

PROMPT FOR TEAM-AI DIALOGUE

Stress-Test New Business Models

You (gen AI) guide our team that includes [*list members*] through stress-testing our proposed business model [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Briefly summarize the business model to make sure you understand it correctly.

[*Step 2*] Challenge, one at a time, the value proposition, operating feasibility, and financial feasibility of our business model. Focus on three weak points.

[*Step 3*] Take the perspective of a stakeholder of our choice and list two additional challenges to our business model. Wait for our feedback and ask us if we want to rerun this step with another stakeholder.

[*Step 4*] Recap the challenges we need to discuss as a team in order to strengthen our business model.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Explore ecosystem implications. Changes to a business model can affect much more than internal functions, operations, or the sales model. They create ripple effects across the broader ecosystem, impacting customers, distributors, and partners. Gen AI helps teams anticipate potential implications and reflect on how to manage them. It can suggest critical dependencies, potential partner reactions, and mitigation strategies.

- **Try this:** "Based on our first draft of a business model [*share or upload*], list relevant ecosystem stakeholders and ask us questions, one at a time, to assess how each might be impacted by the new model."

- **Try this:** “Help us simulate a scenario: What if our new business model disrupts a traditional player of our ecosystem, such as [*specify*]? What happens?”

- **Try this:** “Guide us through identifying critical dependencies along the value chain that could be affected by the new business model *[share or upload*]. Proceed one step at a time.”

- **Try this:** “Act as our partners [*specify*]. Simulate their potential reactions to the changes [*specify*] in our business model and suggest strategies to address or mitigate their concerns.”

After the Session

To turn the concept you developed in the session into a working business model, it is critical to validate assumptions, gather feedback, and iteratively refine the model. Gen AI accelerates this phase by structuring validation plans, simulating stakeholder feedback on key hypotheses, and guiding iterative revisions, ensuring that the creative work done by the team translates into robust, testable business models.

Validate the plan. For each component of the business model (such as value proposition, delivery model, and monetization), teams must identify key assumptions and document them explicitly. Gen AI helps teams list these assumptions, flag which are most critical, and suggest practical ways to validate them. This ensures that no major or hidden risks are overlooked and provides a structured approach to testing the model.

- **Try this:** “Help us list three key assumptions for each block of our business model canvas [*share or upload*], suggesting which one is most critical to validate first.”

- **Try this:** “Guide us, one step at a time, in creating a structured plan for validating the most critical assumptions [*share*] of our business model, suggesting two qualitative and two quantitative methods.”

- **Try this:** “Considering these criteria [*specify*], assist us in prioritizing assumptions [*specify*] based on their impact on the model’s success and the feasibility of testing them.”

Provide synthetic feedback. What can teams do if they can’t efficiently reach their customers or certain segments to collect the data they need to test their business model idea? AI helps simulate potential stakeholder reactions and feedback. In this way teams can start pretesting the robustness of their hypotheses and refine weak points early.

- **Try this:** “Help us simulate reactions from this stakeholder [*specify*] to our proposed business model [*share or upload*], providing questions, critiques, and alternative perspectives.”

- **Try this:** “Identify which assumptions [*share or upload*] the stakeholder [*specify*] is most likely to challenge and suggest ways to strengthen them.”

- **Try this:** “Help us create a persona [*specify, for example, customer, supplier*] to test this assumption [*specify*]. Guide us, one step at a time, to define the persona’s characteristics, goals, and behaviors; then generate a questionnaire we could use and simulate realistic answers from this persona.”

Iterate and revise. As feedback—synthetic or human—is collected, the business model must be iteratively refined. Gen AI assists teams through updating assumptions; adjusting the value proposition, delivery model, or monetization strategy; and ensuring that each revision maintains internal consistency.

- **Try this:** “Help us revise our business model canvas [*share or upload*] based on collected feedback [*share or upload*], prompting us to reflect on which elements need adjustment.”

- **Try this:** “Assist us in documenting changes and updating the assumptions checklist [*share or upload*], so our team maintains a transparent record of iterations.”

- **Try this:** “Help us reflect on our business model in light of the feedback received [*share or upload*]. Ask us one question at a time about whether the model is still valid, requires a pivot, or should be abandoned altogether.”

SECTION FIVE

Problem-Solving in Teams with Generative AI

CHAPTER 20

Problem-Solving Activities That Are Enhanced with Gen AI

There's nothing worse than getting a group of smart people together to solve a problem and having the discussion devolve into chaos.[1] Whether it's resolving a technical breakdown, managing a customer issue, or navigating a public relations crisis, teams must be able to shift from confusion to clarity and from symptoms to solutions. Some problem-solving activities like incident response or crisis management are urgent and high stakes, requiring rapid coordination and decisive action. Others, like customer problem resolution, allow more time for reflection and structured analysis.

Regardless of urgency, all of these sessions are crucial, yet they're often poorly executed. Common pitfalls include unclear problem definition, lack of shared understanding, fragmented stakeholder alignment, and moving to solutions too quickly.[2] Teams may conflate symptoms with root causes, rely on habitual fixes, or struggle to apply structured problem-solving methodologies. The result is solutions that don't stick.

TABLE 20-1

How gen AI enhances team problem-solving activities

Team activity	Before	During	After
Chapter 21: Troubleshooting	• Gather data and diagnostics • Align on the trouble • Tap into past fixes	• Spot the anomaly • Guide the quick fix • Suggest advanced actions	• Report the incident • Track the impact • Update manuals
Chapter 22: Crisis response	• Create a situation briefing • Assemble the right team • Retrieve the protocols	• Assess risk and impact • Follow the playbook • Explore response options	• Craft the crisis communications • Build the recovery plan • Capture learnings
Chapter 23: Root cause analysis	• Analyze the failure • Select the root cause analysis method • Set the agenda and invite experts	• Guide the inquiry • Help visualize the logic • Surface overlooked dimensions	• Propose corrective actions • Document the analysis • Review the standard procedures
Chapter 24: Design thinking	• Establish the methodology • Equip the team • Generate user insights	• Facilitate divergence and convergence • Turn ideas into visual solutions • Accelerate solution prototyping	• Craft the narrative • Prepare solution testing • Gather human or synthetic feedback

Gen AI can be a powerful partner in team-based problem-solving. It helps teams dig deeper into the root of the issue before jumping to solutions. Instead of ad hoc or rushed thinking, AI encourages a step-by-step approach and supports the use of structured methods. It also brings in multiple perspectives, helping teams see the problem from different points of view and consider angles they might otherwise overlook. Thanks to its multimodal capabilities, gen AI can create and visualize tools like fishbone diagrams or causal maps, making it easier to explore complex problems and keep discussions focused and constructive.

In this section you will learn how to leverage gen AI for troubleshooting, crisis response, root cause analysis, and design thinking with concrete examples of prompts that you can try before, during, and after each session.

CHAPTER 21

Troubleshooting

Every team encounters unexpected breakdowns that test how well they coordinate and solve problems together. In a manufacturing plant, a production line might halt. In IT, an application might crash after a new software release. In logistics, shipments might be delayed because scanners are not reading barcodes properly. Even in customer service, a sudden spike in complaints may be due to a billing process breakdown.

In all these situations, troubleshooting activities are fast-paced, hands-on efforts focused on getting systems back up and running as quickly as possible. Although robust troubleshooting practices are well established in some functions like IT, where structured frameworks, detailed diagnostics, standard operating procedures (SOPs), and documented runbooks make problem resolution more systematic, many other functions rely on ad hoc approaches.[1] Without this level of discipline, the pressure to act fast can lead to common missteps.[2] One frequent mistake is jumping to a fix before fully understanding the problem, which often results in temporary solutions that don’t address the cause. This can increase the risk of recurrence, frustration, and extended downtime. At other times, relying too heavily on past fixes or improbable theories can misdirect efforts and delay true resolution.

Gen AI can boost productivity by checking whether the issue is already mapped in existing manuals or operating procedures, guiding the team through quick fixes following codified steps, generating incident reports, and updating manuals. While these capabilities can help teams think, solve, and act faster, gen AI can go further. When a quick fix isn’t enough or the

problem is complex, gen AI can prompt the team to investigate further, test alternative hypotheses, and explore additional solutions.

Before Troubleshooting

Troubleshooting is a team activity often convened at speed, leaving little time for structured preparation. Yet even a few minutes of focused setup can dramatically improve outcomes. Gen AI can support organizers by rapidly aligning the rest of the team on the problem and track any significant gaps in understanding. It can also gather relevant information sources and data, including scanning past incidents and related fixes.

TABLE 21-1

How gen AI enhances troubleshooting

Team activity	Before	During	After
Troubleshooting	• Gather data and diagnostics • Align on the trouble • Tap into past fixes	• Spot the anomaly • Guide the quick fix • Suggest advanced actions	• Report the incident • Track the impact • Update manuals

Gather data and diagnostics. Gen AI assists in collecting and interpreting relevant data and input to support the team's troubleshooting discussion. Also, it helps formulate first diagnostic hypotheses (for example, "Analyze the system logs [*share or upload*] and list all the anomalies that may indicate the source of the issue").

- **Try this:** "Create a checklist of the most important information or evidence to gather before our troubleshooting session, based on the type of problem we're facing [*specify*]."

- **Try this:** "Suggest practical ways to quickly gather input from people [*specify*] impacted by the issue [*specify*], so we have firsthand perspectives before we start troubleshooting."

Align on the trouble. Too often, troubleshooting teams come to the table with different information and interpretations of the issue. Gen AI helps gather input from key stakeholders shared via chat or email and synthesizes it into a problem statement that aligns everyone from the start.

- **Try this:** "Compare the inputs received from different stakeholders [*share or upload*] and analyze where their understanding of the issue [*specify*] differs. Suggest a framing that helps align everyone."

- **Try this:** "Ask us questions, one at a time, about what happened, when it started, what changed recently, how it impacted our business, and what potential causes we've already ruled out. Then, draft a concise problem description based on these system alerts and user reports [*upload or paste*]."

- **Try this:** "List five guiding questions to use during the troubleshooting session [*specify problem*]. In addition, provide typical dos and don'ts from best practices to help me, the organizer, handle the session well, ensuring there is alignment on the issue and structured discussion on the fixes."

Tap into past fixes. Time is precious when troubleshooting; learning from past incidents can save hours and prevent costly mistakes. Gen AI can rapidly scan your organization's records or external resources to pinpoint relevant solutions.

- **Try this:** "Search our incident archive [*share or upload*] and identify similar cases to [*specify*]. Summarize how they were resolved and who was involved."

- **Try this:** "Guide us, one step at a time, to compare this issue [*specify*] with past ones in this document [*share or upload*] and explain what's different or potentially recurring."

- **Try this:** "Suggest possible fixes for this problem [*specify*] from public knowledge bases or vendor documentation [*share or*

upload]: Which ones actually make sense for our context, and why?”

During Troubleshooting

The immediate goal during a breakdown is to restore normal operations. Gen AI acts as a real-time troubleshooting partner, helping the team determine whether the issue is already documented or if it’s a new anomaly. It can guide the team through known resolution steps, suggest corrective actions, including those that are not immediately obvious, and prompt deeper investigation when needed. Gen AI’s multimodal capabilities also allow it to analyze photos, videos, or other visual evidence, making it especially useful in hands-on environments like manufacturing, health care, logistics, or retail.

Spot the anomaly. When an issue arises, gen AI can check whether it’s been seen before. If it matches existing documentation, it guides the team through the prescribed fix. If it’s new, gen AI helps the team explore the anomaly, for example, by comparing it to similar past cases.

- **Try this:** “Review photos [*upload*] of the problem [*specify*] and point out any visible signs of malfunction or damage.”

- **Try this:** “Here’s what’s happening: [*specify*]. Act as [*specify*] and explain how this should work under normal conditions, then point out what looks off and why.”

- **Try this:** “Check if this issue [*specify*] is listed in our troubleshooting manual or past records [*share or upload*]. If not, guide us, one step at a time, to explore the anomaly by comparing it to similar incidents from external sources [*specify*].”

Guide the quick fix. Gen AI acts as an expert troubleshooter, suggesting immediate corrective actions, walking the team through step-by-step restoration procedures, and providing backup options when initial fixes don’t work.

- **Try this:** "Based on our discussion so far, suggest five corrective actions we can take right now to restore basic functionality, prioritized by likelihood of success and ease of implementation."

- **Try this:** "Guide us through practical diagnostic steps based on the symptoms [*specify*], as described in the SOPs [*share or upload*]. Proceed one step at a time."

- **Try this:** "Help us implement the suggested fix [*specify*] by outlining preparation steps, execution sequence, and rollback procedures if something goes wrong, and how to verify the fix actually worked."

Suggest advanced actions. If a quick fix isn't enough or the issue is too complex, gen AI guides the team to investigate further, test alternative hypotheses, and consider other solutions.

- **Try this:** "Our initial fix didn't work [*describe attempt*]. Before we try something else, help us understand: 'What did this failure tell us about the problem?' Then, based on our answers, suggest three different approaches."

- **Try this:** "Before we implement this proposed fix [*specify*], ask us three questions, one at a time, about the ripple effects (for example, how this fix might impact other systems, processes, or stakeholders)."

- **Try this:** "Prompt us to consider whether this issue points to a broader systemic weakness. Ask us three questions, one at a time, about our processes and then help us decide whether we need to investigate systemic issues beyond just fixing this problem."

PROMPT FOR TEAM-AI DIALOGUE

Enhancing Troubleshooting Discussions

You (gen AI) act as an expert facilitator guiding our team [*list members*] through a structured troubleshooting discussion for this issue [*share or upload*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us three questions, one at a time, to clarify the context, symptoms, and affected areas.

[*Step 2*] Check for any known fixes or standard procedures in our manuals or troubleshooting guides [*share or upload*]. Ask us two questions, one at a time, to better focus your research. Then suggest the three most appropriate fixes and ask us for validation.

[*Step 3*] If the problem isn't covered by standard fixes, search both our internal records [*specify, for example, incident archives*] and external sources [*specify, for example, public knowledge bases, vendor documentation, industry case studies*] for similar cases and relevant solutions. Summarize what was tried, what worked, and what lessons were learned. Ask us which solutions seem most relevant or feasible for our situation.

[*Step 4*] Guide us, one step at a time, on how to carry out the chosen solution.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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After Troubleshooting

Gen AI helps teams document the incident, reflect on the impacts of the fix, and update manuals or SOPs accordingly.

Report the incident. Gen AI can generate an accurate summary of the troubleshooting activity: issue description, actions taken to address it, and outcomes.

- **Try this:** "Organize our session meeting minutes and system logs [*upload*] into a clear incident report [*specify format*]. Make sure you understand the context of the incident before proceeding."

- **Try this:** “Create a shorter version of the incident report [*share or upload*] for our leadership [*specify audience and format*].”

- **Try this:** “Ask us questions, one at a time, to help us extract three lessons learned and recommendations for future incidents.”

Track the impact. Gen AI helps monitor performance after the fix and flags any signs of recurrence.

- **Try this:** “Suggest what metrics we should track and for how long to ensure that this fix [*specify*] is working successfully.”

- **Try this:** “Help us, as a team, reflect on how we can compare post-fix performance to baseline. Proceed one question at a time.”

- **Try this:** “Draft a follow-up checklist to confirm the fix [*specify*] is holding over time.”

Update manuals. Gen AI assists in updating internal documentation, SOPs, or troubleshooting guides.

- **Try this:** “Review our troubleshooting guide [*share or upload*] and recommend updates or additions based on the latest incident [*specify*].”

- **Try this:** “Draft a new entry for our incident response playbook [*share or upload*] based on this session.”

- **Try this:** “Suggest improvements to our documentation format to make it easier to use in future troubleshooting sessions. Ask us two questions that can help you understand main difficulties we encountered.”

- **Try this:** “Create a one-page guide on this failure [*specify*] for training purposes, detailing what went wrong, how it was fixed, and what to watch for next time.”

CHAPTER 22

Crisis Response

Crisis response is a problem-solving activity that demands immediate, coordinated responses during high-stakes, time-sensitive situations: from operational disruptions like supply chain breakdowns and data breaches to external shocks like the Covid-19 pandemic or reputational threats such as product recalls and social media backlash. Whether labeled “war rooms,” “incident response sessions,” or “emergency leadership councils,” these gatherings share a common purpose: rapidly assessing the situation, making informed decisions, and executing immediate responses.

When executed properly, crisis response activities are essential for minimizing damage and restoring control. Too often, however, they are chaotic or reactive. Participants arrive with incomplete information, unclear roles, and no shared understanding of the situation. Decision-making can become improvisational under pressure or overly political. Senior voices can dominate, while diverse perspectives and frontline insights are overlooked. Communication lags behind unfolding events, creating internal and external confusion.[1] And when the immediate crisis is resolved, the lessons the team learned are rarely captured.

Gen AI offers practical support to help teams overcome these challenges. It enhances productivity in crisis response meetings by preparing situation briefings, retrieving relevant protocols, following playbooks, crafting communications, drafting recovery plans, and capturing lessons learned. These capabilities help teams stay organized under pressure and ensure that critical information and decisions are clearly documented. Beyond productivity, gen AI elevates the crisis response by helping teams evaluate

different paths forward, modeling best-case, worst-case, and most likely scenarios. It can simulate stakeholder reactions to each option, examine potential unintended consequences, and guide reflection on trade-offs between competing priorities like speed versus accuracy, transparency versus legal protection, or short-term containment versus long-term reputation.

TABLE 22-1

How gen AI enhances crisis response

Team activity	Before	During	After
Crisis response	• Create a situation briefing • Assemble the right team • Retrieve the protocols	• Assess risk and impact • Follow the playbook • Explore response options	• Craft the crisis communications • Build the recovery plan • Capture learnings

Before the Crisis Response

Gen AI accelerates team preparation by delivering the situation briefing, assembling the right response team, and retrieving the relevant protocols. This allows the team to lay a structured foundation for an effective crisis response.

Create a situation briefing. Gen AI helps prepare a structured briefing that summarizes what happened, what's known, what's unknown, and what risks require immediate attention. It scans internal and external sources to confirm facts and find contradictions, suggesting questions to discuss as a team.

- **Try this:** "Interview us in a dialogue to gather information that helps you create a one-page situation briefing summarizing the crisis: what happened, when, verified impact, current unknowns, and immediate risks. Ask one question at a time."

- **Try this:** “Cross-reference internal reports on [*specify topic*] with external sources from [*specify, for example, company’s website*] to verify facts and identify contradictions in this briefing [*share or upload*].”

- **Try this:** “Let’s have a dialogue on what we don’t know about [*specify*], and what we might be overlooking in this crisis situation. Ask one question at a time.”

Assemble the right team. Gen AI helps identify who should be in the crisis room based on the expertise needed, decision authority, and stakeholder relevance. And when key stakeholders can’t be present, AI can act as a proxy, voicing their likely concerns, priorities, or objections based on past input, role, or context.

- **Try this:** “Recommend who should attend the crisis meeting based on what’s happening [*specify*] and required expertise [*specify*].”

- **Try this:** “We’re having a crisis response meeting on [*specify*]. This is the list of participants [*share or upload*]; are there any stakeholders missing? Explain why their input might be important.”

- **Try this:** “Act as [*specify*], who cannot join the crisis response meeting, and based on email exchanges on this issue [*specify*], represent their perspective.”

Retrieve the protocols. Gen AI helps search for a company’s relevant playbooks or procedures, as well as external regulatory guidelines based on the type of crisis. It can match the current situation to past cases and suggest best practices or required steps.

- **Try this:** “Based on the crisis we’re facing [*specify*], retrieve relevant response protocols or guidelines from [*specify sources*].”

- **Try this:** “Guide us through crisis response procedures step-by-step; ask us one question at a time to help us apply them to our situation.”

- **Try this:** “Search for any regulatory or compliance procedures we must follow for this type of event [*specify*].”

During the Crisis Response

Gen AI supports crisis response teams by helping assess risk and impact, follow procedures, and explore response options.

Assess risk and impact. Gen AI helps the team quickly assess the scope and severity of the crisis across multiple dimensions—financial, operational, reputational, and legal. It supports prioritization of the most relevant risks to focus on. Gen AI’s highest value in a crisis is its ability to ask the hard questions teams miss under pressure: “Which risks compound each other?” “What second-order effects are we ignoring?” “Where are our blind spots?” AI helps teams think beyond immediate containment to understand how the crisis could evolve.

- **Try this:** “Based on our discussion so far, help us reflect on which risks are most severe and urgent, and how they may evolve. Proceed one risk at a time and wait for our feedback.”

- **Try this:** “Walk us through escalation pathways: ‘How could this crisis evolve over [*specify, for example, next 24 hours, week, or month*] if left unaddressed?’”

- **Try this:** “Compare this situation to a similar crisis [*specify*]: ‘What patterns should inform our response priorities?’”

- **Try this:** “Help us avoid tunnel vision by examining this crisis from a different perspective [*specify*]. ‘How would [*specify customers, regulators, employees, media, or investors*] interpret this situation, and what critical viewpoints are we missing?’”

Follow the playbook. Gen AI can track whether a company is following containment steps correctly and flag any deviations from the company’s policies or manuals. It acts as a procedural guide, helping the team stay in compliance.

- **Try this:** "Guide us through the playbook [*share or upload*]. Ask one question at a time to help us apply it to our crisis situation [*specify*] and focus on what matters most."

- **Try this:** "Compare our current response [*specify*] to the playbook [*share or upload*] and underline gaps or inconsistencies."

- **Try this:** "Identify which protocol steps are mandatory (for example, regulatory or legal requirements) versus optional in this document [*share or upload*] to ensure that we're fully compliant."

Explore response options. Gen AI helps the team evaluate different paths forward, modeling best-case, worst-case, and most likely scenarios. It also simulates stakeholder reactions to each option. It guides teams through complex trade-offs between competing priorities, such as short-term containment versus long-term reputation, ensuring that good decisions are made with full awareness of their implications.

- **Try this:** "Given the crisis situation we're discussing, model three response scenarios and outline implications for [*specify, for example, resources, timelines, and reputation*]."

- **Try this:** "Simulate reactions to our crisis response option [*specify*] from key stakeholders [*specify*] and suggest communication strategies."

- **Try this:** "Guide us, one question at a time, to reflect on potential unintended consequences or backfire effects for each crisis response path we're considering [*specify*]."

PROMPT FOR TEAM-AI DIALOGUE

Pressure Test Your Crisis Response Option

You (gen AI) act as a crisis management expert guiding our team that includes [*list members*] to evaluate how the most relevant stakeholders may react to our response to this crisis [*share or upload*] and how we can mitigate risks.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to briefly describe the response we want to challenge. Make sure you understand the context, and if not, ask two probing questions.

[*Step 2*] Propose a list of potential stakeholders and suggest which have the highest impact or influence. Ask us to select the three most relevant.

[*Step 3*] For each selected stakeholder, take their perspective, simulate their worst-case reaction to our response, and propose three ways to mitigate risks. Ask for our feedback before moving to the next stakeholder.

[*Step 4*] After all three stakeholders are simulated, summarize the findings in a simple table with three columns (stakeholder, worst-case reaction, mitigation strategies).

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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After the Crisis Response

Once the immediate crisis is contained, gen AI helps teams craft timely communications, design a phased recovery plan, and capture learnings, turning reactive responses into long-term resilience.

Craft the crisis communications. Gen AI assists teams in communicating effectively with all stakeholder groups during a crisis. It can craft tailored messages that vary in tone and level of details while maintaining factual accuracy. It helps cross-reference all statements against verified information, flags potential legal risks, and ensures that communications align with the voice of the brand.

- **Try this:** “Ask us questions, one at a time, to help us reflect on how to communicate with different audiences [*specify, for example, employees, customers, regulators, public opinion*].”

- **Try this:** “Act as a communications expert and ask us questions, one at a time, on communication priorities during this crisis [*specify*]: What must we say immediately, what needs coordination, and what could backfire if we rush?”

- **Try this:** “Review our draft communications [*share or upload*] for factual accuracy, consistent tone, and potential misinterpretation risks.”

- **Try this:** “Act as [*specify stakeholder*] reading our draft communication: How would you interpret this message, what concerns would you raise, and what changes would you suggest to make it more effective?”

Build the recovery plan. Gen AI helps teams move from reactive firefighting to structured recovery. It can help create phased road maps by prompting the team’s critical thinking on topics such as what successful recovery looks like.

- **Try this:** “Ask us questions, one at a time, to help us design our recovery plan: What’s truly urgent and how should we sequence our efforts?”

- **Try this:** “Explain what successful recovery looks like, beyond just fixing the immediate problem.”

- **Try this:** “According to our draft plan [*share or upload*], guide us, one stakeholder at a time, to identify which stakeholder relationships may need repair and how to address them.”

- **Try this:** “Act as a skeptical stakeholder [*specify*] challenging our recovery plan [*share or upload*]: What assumptions are questionable, which timelines seem unrealistic, where might we be

underestimating complexity, and what could go wrong that we haven't considered?"

Capture learnings. Gen AI facilitates structured reflection that transforms the experience of the crisis into organizational wisdom by guiding teams through an assessment of what worked, what did not, and why. It helps teams think systematically about pattern recognition, early-warning systems, and playbook improvements to help organizations strengthen their crisis readiness for the future.

- **Try this:** "Act as a crisis response expert in [*specify*] and guide us through an honest debrief: What decisions were effective, what created delays or confusion, and what would we change if facing this again? Ask one question at a time."

- **Try this:** "Challenge us: What early signals did we miss, and how could we detect similar situations sooner next time?"

- **Try this:** "Design five feedback questions that capture not just what happened, but how team dynamics, communication, and coordination could improve during a crisis response meeting."

CHAPTER 23

Root Cause Analysis

Root cause analysis (RCA) is used to understand why problems happen and how to prevent them from recurring.[1] Originally developed in manufacturing and safety-critical industries, RCA is now widely used across sectors, from tech and operations to customer service, HR, and compliance. The goal of RCA is to move beyond what happened to uncover why it happened. Depending on the industry, examples can vary widely. A factory might see a sudden spike in defective units leaving the line. A software platform could go down for several hours, disrupting customer operations. A call center may experience a surge in customer churn. A finance team might uncover a control failure during an audit. Or an automotive company could face a technical failure in its powertrain system, raising safety and reliability concerns. Each of these scenarios calls for a focused activity to investigate the underlying issue, trace its origins, and define corrective actions.

Teams can use well-established approaches and frameworks to make RCA systematic, for example, the Ishikawa (fishbone) diagram, the iceberg model, and the five whys technique.[2] When applied well, these methods help teams follow a structured analysis, explore all relevant dimensions, dig into real causes uncovering hidden system weaknesses, improve processes, and reduce future risk. They also foster cross-functional learning and build trust across departments. Yet in practice, many RCA sessions fall short. Teams may confuse symptoms with causes, stopping at surface-level explanations like “operator error” or “software bug” without asking why those occurred.[3] Under pressure, analysis may be superficial, with teams

skipping data gathering and reaching conclusions too quickly. The right voices may be missing, especially those with firsthand process knowledge, leading to blind spots. Investigations may start too late, resulting in poor or incomplete data. Moreover, in cultures where people fear blame, they may withhold information, keeping the true causes hidden. Even when teams reach insights, they may not assign or track action, allowing the same issues to resurface.

Gen AI makes RCA activities more productive by helping teams describe the problem and gather relevant data, list relevant expertise needed, then document the analysis and review the standard procedures. Beyond improving productivity, gen AI can act as an expert facilitator for the chosen RCA method, guiding the team's inquiry to uncover underlying causes, surface overlooked dimensions, prompt deeper "why" questions, consider multiple perspectives, and challenge assumptions.

TABLE 23-1

How gen AI enhances root cause analysis

Team activity	Before	During	After
Root cause analysis	• Analyze the failure • Select the root cause analysis method • Set the agenda and invite experts	• Guide the inquiry • Help visualize the logic • Surface overlooked dimensions	• Propose corrective actions • Document the analysis • Review the standard procedures

Before Root Cause Analysis

Effective preparation is what turns root cause analysis from a reactive session into a structured investigation. Gen AI supports teams with data collection, problem framing, and method selection.

Analyze the failure. The way people describe a problem shapes the entire RCA. Often, the initial write-up reflects the perspective of the people

drafting it. If a technical team writes it, they may focus on system behavior; if a business team writes it, they may emphasize the customer service impact or financial consequences. Gen AI helps frame the problem in a neutral, fact-based way by combining inputs from multiple lenses. It can also compare the failure with similar past problems.

- **Try this:** "Review this failure description [*share or upload*] and assess whether it's framed objectively or includes any subjective or biased language. Ask us three questions, one at a time, to uncover missing context. Then suggest a revised version that reflects a balanced, fact-based problem description."

- **Try this:** "Identify what's unclear or incomplete in our problem framing [*share or upload*] by analyzing it from the perspective of [*specify*]."

- **Try this:** "Explain the best practices for framing a clear, fact-based problem statement for root cause analysis. Review our draft [*share or upload*] and evaluate it against best practices. Provide a rationale for each suggestion."

Select the root cause analysis method. Choosing the right method, whether the five whys, Ishikawa diagram, or another method, depends on the nature of the issue and the team's experience. Gen AI can guide this selection based on the problem type, available data, and desired depth of analysis. It can also prepare a step-by-step guide for the chosen method to support execution.

- **Try this:** "Based on this problem description [*specify*], recommend the most suitable RCA method and explain why. Make sure you understand the problem before proceeding."

- **Try this:** "Generate a brief step-by-step guide for facilitating an [*specify approach, for example, five whys or fishbone*] RCA session with my team."

- **Try this:** "Compare the pros and cons of different RCA methods relevant to this type of issue [*specify*]."

- **Try this:** “Help us familiarize ourselves with the [*specify RCA method*]. Explain the logic and structure of the approach; provide a simple example for [*specify context*]. Share practical tips for applying it effectively in a team setting and common mistakes or ‘don’ts’ we should avoid.”

Set the agenda and invite experts. Gen AI helps structure the RCA according to the chosen framework or method, sequence discussions logically, and allocate sufficient time for each phase of the analysis. It suggests the right experts and stakeholders who should be involved to ensure a thorough understanding of the process and the broader context. AI can identify missing voices or perspectives based on the nature of the failure.

- **Try this:** “Considering the type of problem [*specify*] and the chosen method [*specify*], guide us, one step at a time, to draft a two-hour agenda for the RCA session.”

- **Try this:** “Based on the type of problem [*specify*], suggest which roles or experts we should invite to the RCA session, and explain why.”

- **Try this:** “Help us identify three external stakeholders who should be represented as synthetic personas in the RCA session about [*specify*].”

During Root Cause Analysis

When the team collaboratively explores the failure using the selected RCA method, gen AI can guide the inquiry step-by-step. It asks key questions, highlights different dimensions of the analysis, suggests overlooked perspectives, and helps visualize the logic of causes and effect (for example, by progressively filling in the various branches of a fishbone diagram).

Guide the inquiry. Gen AI acts as a methodology expert, explaining the chosen approach, walking through its logic, and guiding its application in real time. For example, in a five-whys session, gen AI can guide the team to

address one “why” at a time, ensuring that each answer is explored fully before moving to the next. It can suggest when a line of inquiry needs further probing.

- **Try this:** “Based on our team’s discussion so far, suggest questions to probe deeper into additional root causes.”

- **Try this:** “We are analyzing [*specify problem*]. Guide us through a five-whys session one question at a time, ensuring that each response is explored fully before moving to the next ‘why.’”

- **Try this:** “In which areas [*share or upload*] are we conflating symptoms with underlying causes? Suggest follow-up questions to clarify.”

Help visualize the logic. Many RCA methods are inherently visual to help capture the complexity of a problem. Gen AI assists by translating the team’s discussion into structured visual representations such as fishbone diagrams, causal trees, or flowcharts. These visualizations make relationships between factors clearer, help identify missing links, and provide references for later review and follow-up.

- **Try this:** “Based on our discussion so far, convert the identified causes and contributing factors into a visual diagram [*specify format: fishbone diagram, causal tree, or flowchart*].”

- **Try this:** “As we discuss the failure, help us build the [*specify format: fishbone diagram, causal tree, or flowchart*]. Proceed step-by-step, waiting for our input. For each new cause or contributing factor, add it to the diagram only after confirmed by the group. Keep a change log so we can revisit earlier assumptions.”

- **Try this:** “Suggest the most effective visualization format to represent the causal logic emerging from our RCA session.”

Surface overlooked dimensions. When problems are complex, teams can miss important perspectives or hidden factors. Gen AI can take the perspective of

an expert or outsider and help identify overlooked dimensions and consider alternative root causes.

- **Try this:** "Identify three potential causes or contributing factors that we have not discussed yet. For each, explain why it could be worth investigating."

- **Try this:** "Simulate the viewpoint of [*specify stakeholder*] on this problem [*specify*]: What three questions would they ask to better understand the root causes of this problem?"

- **Try this:** "Review our list of identified causes [*share or upload*] and challenge us by pointing out gaps, contradictions, or potential blind spots. Suggest three questions to help us probe deeper."

PROMPT FOR TEAM-AI DIALOGUE

Mapping the Potential Root Causes of a Problem

You (gen AI) guide our team that includes [*list members*] in applying the fishbone approach (also known as the Ishikawa diagram) to analyze the potential root causes of [*specify problem; share or upload any relevant documents or pictures*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to describe the problem we are facing and to provide a concrete example. Wait for our answer. Then take the perspective of an expert on this problem and ask us two questions on the problem context.

[*Step 2*] Briefly explain the logic of the Ishikawa method and how it applies to our situation.

[*Step 3*] List five categories that are relevant to the problem. Then ask us to integrate those five categories with overlooked categories.

[*Step 4*] For each category, ask us to list potential root causes. Proceed one category at a time.

[*Step 5*] Challenge us by looking at the problem from a different perspective and propose alternative root causes. Wait for our feedback on the final list of root causes before proceeding.

[*Step 6*] Summarize the discussion into a visual fishbone diagram and describe the logic, the relationships between causes, and the key insights in three paragraphs. Ask for our feedback before finalizing the output.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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After Root Cause Analysis

Once you've identified the root cause, your focus shifts to designing corrective actions and then making sure the organization learns from the failure. Gen AI helps teams propose realistic and targeted actions and review existing procedures that may need updating. This phase turns analysis into improvement, ensuring that what was learned gets embedded into updated processes, standards, or rules to prevent recurrence.

Propose corrective actions. Designing effective corrective actions is essential for teams that aim to prevent problems from recurrence. Gen AI can help define and prioritize practical solutions based on their expected impact. It can also help break down broader actions into a specific step-by-step plan.

- **Try this:** "Based on the root causes identified during our RCA session [*share or upload*], propose three corrective actions that address each cause. For each action, explain its expected impact on the problem."
- **Try this:** "Guide us, one step at a time, to prioritize the corrective actions [*share or upload*] based on these criteria [*specify*]."
- **Try this:** "Help us expand the corrective action from a simple title into an actionable plan that includes [*specify, for example, tasks,*

deliverables, owner, milestones]. Ask us three questions, one at a time, that can help you detail the plan."

Document the analysis. Gen AI summarizes the team's RCA in a structured format, converts visual diagrams into descriptive narratives, and identifies key causes, supporting evidence, and reasoning. This creates a visual and textual memory of the analysis that other teams can retrieve and interrogate later.

- **Try this:** "Before we end our session, generate a concise executive summary of the main root causes and our reasoning behind them."

- **Try this:** "Create a detailed RCA report in [*specify format*] based on the session [*share or upload*] for [*specify recipient stakeholder*]."

- **Try this:** "Convert the visual output [*share or upload, for example, fishbone diagram or fault tree*] into a clear narrative that a nontechnical audience can understand."

Review the standard procedures. Findings from the root cause analysis often reveal gaps in existing procedures, policies, or controls. Gen AI can help compare the RCA findings and proposed corrective actions with current standard procedures, locate inconsistencies or missing steps, and suggest updates to prevent similar failures in the future or at least mitigate the associated risks.

- **Try this:** "Compare the RCA findings [*share or upload*] with our current procedures [*share or upload*] and list all the potential gaps or inconsistencies."

- **Try this:** "Based on our RCA [*share or upload*], suggest updates to existing SOPs [*share or upload*] to address the root causes and prevent recurrence."

- **Try this:** "Help distill lessons learned from this incident [*specify*] that we can incorporate into training materials, checklists, or

compliance documents. Ask for our feedback. Proceed one lesson at a time and wait for our feedback."

CHAPTER 24

Design Thinking

Design thinking is a mindset and approach to problem-solving anchored around human-centered design.[1] It starts with understanding people—their experiences, needs, and constraints—and works backward toward solutions.

Unlike traditional problem-solving that works best when teams tackle well-defined problems, design thinking thrives in ambiguity.[2] It begins not with systems or symptoms, but with people, in particular their experiences, needs, and frustrations.

Instead of asking “What went wrong?” design thinking helps teams ask, “What do people actually need?” and “How might we create something better?” This approach reframes challenges around human needs rather than technical fixes. For instance, in agriculture, the issue isn’t just reducing plant diseases or spraying chemicals; it’s helping farmers navigate climate uncertainty, regulations, and market shifts. In health care, the challenge isn’t simply administering a vaccine dose; it’s building trust and empathy to boost vaccination rates in underserved communities. Similarly, in urban mobility, the problem isn’t only traffic; it’s how people live and move through cities. A core tenet of design thinking is to reframe problems through observation and dialogue with all the stakeholders involved.

Despite design thinking’s success in changing how companies approach problem-solving, it’s often misunderstood or diluted in practice.[3] Participants in design-thinking activities frequently misunderstand the process or lack the skills needed to practice it successfully.[4] It’s no wonder that many in this situation become disenchanted or think the approach has failed. Common pitfalls include doing superficial user research, getting

attached to the first idea, and treating the process as linear. When time or pressure mounts, participants may skip prototyping and user testing, resulting in concepts that sound promising but haven't been validated.

Gen AI can guide teams in selecting the most effective methods for each phase of design thinking, from exploratory techniques during empathy research to prototyping approaches in solution development. It enhances productivity by analyzing user data to reveal patterns and accelerating the creation of mock-ups through its multimodal capabilities. Beyond aiding in execution, gen AI can simulate diverse user personas, offering fresh perspectives during exploration and anticipating stakeholder responses during testing.

TABLE 24-1

How gen AI enhances design thinking

Team activity	Before	During	After
Design thinking	• Establish the methodology • Equip the team • Generate user insights	• Facilitate divergence and convergence • Turn ideas into visual solutions • Accelerate solution prototyping	• Craft the narrative • Prepare solution testing • Gather human or synthetic feedback

Before the Design-Thinking Session

Gen AI guides the team in understanding and selecting the most appropriate methodologies and techniques and helps them become familiar with these approaches. In addition, gen AI can augment traditional research by simulating the voices of user personas, offering insights on perspectives that may be costly or difficult to reach through interviews and surveys.

Establish the methodology. With gen AI, the team can investigate the best practices in a design-thinking process, ensuring that the team approaches all phases—from exploration, ideation, and prototyping to testing—effectively.

- **Try this:** "Based on our challenge [*specify*] and on this list of users or stakeholders to explore [*share or upload*], ask us three questions, one at a time, that can help you select the most suitable exploratory technique approach and explain why it fits."

- **Try this:** "Explain in simple terms the technique of [*specify method*], providing three examples that apply to our challenge [*specify*]."

- **Try this:** "Draft a step-by-step facilitation guide for [*specify phase of design-thinking process, for example, exploration, ideation, prototyping, testing*] based on our challenge [*specify*] and considering that we are not design-thinking experts."

Equip the team. Without proper guidance, teams may find it difficult to successfully apply the design-thinking process to their challenge. Gen AI helps equip team members with the knowledge they need to conduct the activity with confidence. Acting as a methodology expert, it provides hands-on familiarization with the techniques to use while explaining the activity's objectives, context, and scope.

- **Try this:** "Ask us questions, one at a time, that help you prepare a one-page brief summarizing the challenge, what the exploration is about, and who the users and actors are."

- **Try this:** "Explain what this tool [*specify, for example, an observation board*] is and how it supports the exploration phase. Then search for some helpful examples from other organizations in [*specify context or industry*] that show how they have used similar boards."

- **Try this:** "Prepare a practical, hands-on training on design thinking [*or specify a phase or technique*] for complex problem-solving with exercises that can help us familiarize prior to applying it to our challenge [*specify*]. Proceed one exercise at a time."

PROMPT FOR TEAM-AI DIALOGUE

Planning the Design-Thinking Activity

You (gen AI) act as a design-thinking expert and guide our team that includes [*list members*] in planning a design-thinking activity based on best practices and methods and tailored to our challenge *[specify].*

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us to describe the challenge we are facing and to provide a concrete example. Wait for our answer. Then take the perspective of an expert on this challenge and ask us two questions on the context.

[*Step 2*] Briefly explain how design thinking can help tackle our challenge. Ask us if we have doubts or requests for clarification before proceeding to the next step.

[*Step 3*] Suggest how to structure our design-thinking activity in phases. Then proceed one phase at a time, listing the relevant methods and asking us to select our preferred mix.

[*Step 4*] Create a table summarizing each phase: what, how, and who. Wait for our feedback and refine the plan.

[*Step 5*] Provide three dos and don’ts to help us conduct the activity with confidence.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don’t be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Generate user insights. Typically, before ideating the solution, teams conduct preliminary activities focused on understanding the problem, often using exploratory techniques. Gen AI supports the analysis of data collected during user exploration by identifying patterns and helping teams uncover key insights (for example, “Analyze these user interviews [*share or upload*] and summarize insights, patterns, and unmet needs”). It can also simulate synthetic personas (for example, mimicking a specific user segment or family profile) that the team can interact with.

- **Try this:** "Analyze this qualitative research [*share or upload*] and synthesize insights, recurring patterns, and opportunity areas in a [*specify format*]."

- **Try this:** "We would like to expand our list of real interviews [*share or upload*] with synthetic personas. Suggest five types of synthetic personas."

- **Try this:** "Co-create with us a user persona [*specify*] who represents a stakeholder group impacted by our challenge [*specify*]. Ask us one question at a time."

- **Try this:** "Simulate the attitudes and behaviors of [*specify user persona*] and answer our list of questions [*share or upload questionnaire*] about your needs and pain points about [*specify challenge*]."

During the Design-Thinking Session

This is the stage where the team actively generates and iterates solution ideas based on insights from the exploration phase. Gen AI acts as a facilitator, guiding inquiry and providing examples and feedback in real time. It can also help visualize ideas and make first concepts more tangible, accelerating the team's problem-solving.

Facilitate divergence and convergence. Gen AI stimulates team creativity to accelerate the generation of solution ideas that address the needs that emerged during the exploration phase.

- **Try this:** "Lead us through the process from divergent thinking to convergence for our challenge [*specify*], applying [*specify design-thinking technique, such as the Double Diamond process*]. Proceed one step at a time, waiting for our answers."[5]

- **Try this:** "Help us explore less obvious solutions to the challenge [*specify*] by asking us five questions, one at a time. Then translate our answers into three new design ideas."

- **Try this:** “For the identified design ideas [*share*], conduct web research to verify the novelty. We want to make sure these ideas are not already implemented by other players, competitors, and startups.”

- **Try this:** “Act as [*specify, for example, a player from a different industry, serving the same target*] and stress-test our idea [*specify*]. Provide three recommendations for improvement, based on your knowledge of the target user or customer.”

- **Try this:** “Take the perspective [*specify*] and critique the desirability, feasibility, and viability of this solution [*specify*] for our problem [*specify*]. Then, ask for our feedback.”

Turn ideas into visual solutions. Initial solution ideas are often abstract or vague, and not all team members interpret them the same way. Gen AI helps foster clarity and alignment by quickly generating visual representations of proposed solutions and producing multiple variations based on the team’s feedback.

- **Try this:** “We would like you to convert this textual idea [*share or upload*] into [*specify, for example, image, visual sketches, or journey maps*]. Before you do this, ask us three questions, one at a time, that can provide additional context.”

- **Try this:** “Propose five alternative visual representation formats for this concept [*share or upload*] that help us communicate it clearly to users and stakeholders [*specify*].”

- **Try this:** “Act as [*specify user or stakeholder*] and visually represent this solution [*specify*] to make it more tangible and relatable to this user category [*specify*].”

Accelerate solution prototyping. In design thinking, prototyping is traditionally a time-consuming and costly step to produce realistic mock-ups. Gen AI now makes rapid, low-cost prototyping feasible through its multimodal

capabilities, enabling teams to generate and iterate countless solution variations in a fraction of the time.

- **Try this:** "Generate five alternative prototype variations for this concept [*share or upload*], highlighting trade-offs and possible user [*specify*] reactions in a comparison table."

- **Try this:** "Starting from the initial prototype [*share or upload*], ask us three questions, one at a time, to help us refine it and adapt to the specific needs of users [*specify*]."

- **Try this:** "Simulate potential user [*specify*] interactions with the prototype [*share or upload*], identify potential moments of friction, and suggest areas for refinement."

After the Design-Thinking Session

Gen AI helps distill early solution prototypes into a compelling, stakeholder-specific narrative, adapting tone, format, and detail for different audiences. It can also assist the team in drafting an assumption plan, clearly defining what to test, how to test it, and with whom. Furthermore, gen AI can analyze different testing paths and suggest the sequence most likely to maximize learning and balance effort.

Craft the narrative. Gen AI helps explain the benefits for the user of the proposed solution and how it addresses the pain points discovered during the exploration phase.

- **Try this:** "Draft a clear narrative [*specify format*] summarizing the solution [*share or upload*], rationale, and benefits for the users [*specify*] and addressing pain points [*share or upload*] we discovered during the exploration."

- **Try this:** "Take the perspective of the user [*specify*] and describe the solution [*specify or upload*] in 200 words, focusing on the most relevant pain points the solution addresses."

Prepare solution testing. Many prototypes fail because a certain assumption remained hidden and unexplored. Gen AI can help list the key assumptions that need to be tested and suggest ways in which they can be validated practically. It can also recommend the right sequence for testing, starting from the most critical and sensitive ones.

- **Try this:** "Prepare a 10-assumption checklist for testing the solution [*specify or upload*] including what to test, how to test, and how to measure."

- **Try this:** "Ask us three questions, one at a time, to ensure that our key assumptions are captured in the right logical sequence in our plan [*share or upload*]."

- **Try this:** "Guide us, one step at a time, to understand how to use the prototype [*specify*] in front of users and how to test our key assumptions [*share or upload*]. Suggest best-practice approaches."

Gather human or synthetic feedback. Gen AI can analyze feedback collected from real users, as well as generate synthetic feedback when it's not feasible or practical to engage directly with real users. It can then combine this synthetic data with real user feedback gathered from interviews, surveys, or observations, and then help identify patterns and emerging insights to inform further iteration.

- **Try this:** "Act as a skeptical user encountering this solution [*specify or upload*] for the first time. Identify moments of confusion or resistance across the journey. For each moment, explain *why* the user disengages and what would need to change to prevent drop-off."

- **Try this:** "Suggest refinements to the prototype [*share or upload*] based on user feedback [*share or upload*], prioritizing improvements with the most likely impact."

- **Try this:** "Act as [*specify user*] and provide us feedback on the prototyped solution [*specify*]. Cluster by must-have versus delighters. Ask for our feedback."

SECTION SIX

Reviews and Retrospectives in Teams with Generative AI

CHAPTER 25

Review and Retrospective Activities That Are Enhanced with Gen AI

Teams regularly need to pause on execution and create space to review progress and performance together. A review provides moments to step back and assess what the team has achieved against expectations and also to raise important red flags about stumbling blocks and barriers.

Some reviews are formal and data-driven, like business or project reviews; others, like retrospectives, are more reflective and centered on team learning. Regardless of the format, reviews are critical for team alignment: They are an opportunity to revisit what exactly you're doing and, more importantly, why you're doing it. Unfortunately, reviews frequently turn into slide-reading exercises, making the meetings boring and unproductive. Common pitfalls include sugarcoated status reports that avoid difficult conversations and a lack of external or dissenting perspectives. Weak facilitation, vague agendas, and poor time management further erode their impact, leaving little space for open discussion, critical thinking, and decisive action. Many organizations skip retrospectives entirely, eliminating a key opportunity for teams to reflect and capture lessons learned.

You'll greatly improve your next team review by leveraging gen AI. By cutting through data overload, gen AI highlights the most important issues and frames sharper questions to guide the discussion. It also brings in diverse viewpoints and considerations to enrich your team discussion. Most importantly, it helps distill the "so what" of the debate into clear actions and next steps.

In this section you will learn how to leverage generative AI for business reviews, project reviews, solution reviews, and retrospectives, with concrete examples of prompts that you can try before, during, and after each session.

TABLE 25-1

How gen AI enhances review meetings

Team meeting	Before	During	After
Chapter 26: Business review	• Synthetize performance • Focus discussion questions • Anticipate discussion dynamics	• Raise the bar of the discussion • Bring other perspectives • Help resolve conflicting views	• Create personalized summaries • Explore business implications • Reflect on team dynamics
Chapter 27: Project review	• Summarize project status • Create agenda items • Engage with content	• Review progress • Discuss mitigation actions • Suggest next steps	• Document the review • Update project plans • Prepare the next review
Chapter 28: Solution review	• Distill key elements of the proposed solution • Define criteria and questions • Prepare the discussion	• Validate against requirements • Challenge for uniqueness • Consider trade-offs	• Capture discussion items • Revise solutions • Prepare to submit

Team meeting	Before	During	After
Chapter 29: Retrospective	• Structure the reflection • Prepare templates • Collect input	• Support facilitation • Cluster recurring themes • Prompt deeper reflection	• Consolidate outcomes • Plan for improvements • Check sentiment

CHAPTER 26

Business Review

In most organizations, business reviews are a well-established routine. Typically held monthly at the business line level, they serve as a structured forum where cross-functional leaders (sales, operations, R&D, finance, HR) come together to assess business performance and recalibrate priorities. In larger companies with multiple business lines, it is common to also find divisional business reviews, held quarterly or semiannually, to provide a broader view across units and ensure alignment at the divisional level.

Business reviews share a similar structure and purpose: to monitor progress, address cross-functional issues, allocate resources, and set the course for the next period. The most common problem with business reviews is that they turn into a reporting ritual. Slide decks grow longer, a person from each function reads out numbers already visible on dashboards, and the meeting becomes an information broadcast. This wastes time and erodes engagement as participants realize the updates could have been emailed instead. With each function seeking to fit in every metric it tracks, data overload sets in. The signal gets lost in the noise and risks are buried under routine numbers. Unstructured discussions early in the meeting squeeze important topics to the end or postpone them until next time. At the same time, cross-functional discussion rarely happens: Each function reports in isolation, and nobody connects the dots between sales, operations, R&D, and HR, a lost opportunity to tackle interdependence or spot emerging risks across the business. Furthermore, business reviews focus heavily on metrics and operational updates, but they rarely become spaces for team learning and reflection: Discussions about how the team worked

together, what went well in collaboration, or what could improve are often overlooked.[1]

Gen AI can help enhance business reviews in multiple ways. It can quickly synthesize performance data, highlight key discussion questions, and generate tailored summaries for stakeholders. Beyond improving productivity, AI elevates the depth and quality of conversations, brings alternative perspectives that might otherwise be overlooked, helps navigate and resolve conflicting viewpoints between the functions, and prompts reflection on business implications and the team dynamics.

TABLE 26-1

How gen AI enhances business reviews

Team meeting	Before	During	After
Business review	• Synthetize performance • Focus discussion questions • Anticipate discussion dynamics	• Raise the bar of the discussion • Bring other perspectives • Help resolve conflicting views	• Create personalized summaries • Explore business implications • Reflect on team dynamics

Before the Business Review

Gen AI helps teams prepare for the discussion with relevant insights, frames the right questions, and anticipates friction points between different functions. This ensures that the review drives active engagement with the most critical topics rather than a passive sequence of updates.

Synthetize performance. Gen AI doesn’t just analyze KPIs or flag trends—it can help teams make sense of data. This reduces information overload and ensures that attention is focused on the meaning behind the data, not merely the numbers themselves.

- **Try this:** “Turn this performance dashboard [*link*] into a story that highlights the most important trends and explains why they matter for [*specify target audience*].”

- **Try this:** “Ask us three questions, one at a time, that can help you craft a performance story that connects our latest results [*share or upload*] to strategic priorities [*share or upload*] and business impact.”

- **Try this:** “Review this deck [*share or upload*] and identify which messages matter most for decision-makers [*specify*]. Recommend which content can be removed or simplified.”

- **Try this:** “Suggest creative ways to make key takeaways stand out in this presentation [*share or upload*] to help the audience [*specify*] immediately grasp them.”

Focus discussion questions. Gen AI helps design agendas that allow for structured, cross-functional dialogue. It can also suggest a list of questions that keep the review focused.

- **Try this:** “Analyze our performance metrics [*share or upload*], and draft five questions to address during the business review.”

- **Try this:** “Design the business review agenda structured as a set of three key questions, rather than topics. Prioritize questions that drive crossfunctional alignment, uncover tensions, and accelerate action.”

- **Try this:** “Recommend three best practices and practical tips to keep the business review from turning into a mere presentation, without healthy debate and alignment.”

Anticipate discussion dynamics. Gen AI can help anticipate potential tensions between functions, especially when teams operate in silos or have conflicting goals. It also supports guiding the team conversation toward collaboration and problem-solving rather than blame and conflict.

- **Try this:** “Analyze the performance data [*share or upload*]. Summarize the key gaps, trends, and results that will likely shape the upcoming business review discussion.”

- **Try this:** “Suggest phrases that help keep the discussion focused on solving problems together, not blaming others.”

- **Try this:** “Guide us, one step at a time, in framing sensitive topics such as [*specify*] in a way that promotes constructive dialogue, collaboration, and actionable solutions.”

- **Try this:** “Analyze this business review slide deck [*share or upload*] through the lens of [*specify role or function, for example, product lead, CFO, sales director*]. Anticipate how they might respond during the discussion of the most critical points.”

PROMPT FOR TEAM-AI DIALOGUE

Anticipate and Manage Tensions

You (gen AI) guide our team that includes [*list members*] in the preparation of the next business review [*share or upload the agenda*]. Your goal is to help us, the organizing team, anticipate and manage potential points of tension among the business review participants [*list*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask questions, one at a time, to help us reflect on topics that are likely to trigger disagreement, defensiveness, or tensions.

[*Step 2*] List the identified friction points, then search previous business review minutes, chats, and emails for additional elements including three overlooked friction points. Wait for our feedback, then suggest what might be driving the frictions.

[*Step 3*] Ask us to select the one friction point we are most concerned about and explain why. Wait for our response. Then suggest three approaches to preempt or de-escalate the tension.

[*Step 4*] Ask us to select the approaches we would like to apply and provide practical tips.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

During the Business Review

Gen AI strengthens business reviews by acting as a co-facilitator, suggesting questions and tips for more constructive debate, and by playing the role of absent stakeholders to bring additional perspectives into the room.

Raise the bar of the discussion. Gen AI helps keep business reviews from becoming flat or passive by injecting challenge and depth. It can point out unasked questions, propose alternative interpretations, highlight overlooked causes or risks, and challenge the debate on cross-functional issues.

- **Try this:** "Ask us two key questions that haven't yet been addressed."
- **Try this:** "Challenge us by suggesting what's missing from the conversation so far, such as blind spots, risks, or interdependencies that could hinder business outcomes."
- **Try this:** "Suggest five questions that connect the dots across functions and reveal shared challenges or opportunities that require coordinated action."

Bring other perspectives. Business reviews often get stuck looking inward, focusing on dashboards, functional updates, and unrelated organizational issues. Gen AI helps the team step outside that bubble by bringing in

customer viewpoints, competitor benchmarks, and perspectives from stakeholders who aren't in the room.

- **Try this:** "What is behind these results [*specify, for example, a decline in net promoter score*] in terms of real customer experience? Provide real-world, relatable examples that explain what might be happening in our market [*specify*]."

- **Try this:** "Analyze how a competitor's [*specify*] moves or broader market shifts could have influenced our last quarter performance [*share or upload*]."

- **Try this:** "How would our competitor [*specify*] evaluate its positioning versus our last quarter performance [*share or upload*] given market trends? List areas where it may see advantage or vulnerability."

- **Try this:** "How might our suppliers [*specify*] react to this decision [*specify, for example, changes in order volumes*]?"

Help resolve conflicting views. In business reviews, especially when discussing cross-functional issues, conflicting opinions emerge. Each function may see the issue through its own lens, and conversations can become defensive. This can lead to tension, finger-pointing, or stalled discussions. Gen AI can help reframe the problem and guide the group toward a shared understanding. It helps shift the tone from "who's at fault?" to "what can we solve together?"

- **Try this:** "Guide us, one question at a time, to identify where different teams [*specify*] may see the problem [*specify*] differently and suggest questions to align perspectives."

- **Try this:** "Reframe this issue [*specify*] in an objective way, so it's easier to discuss without assigning blame."

- **Try this:** "Ask us questions, one at a time, that help uncover the root causes across functions, not just symptoms seen from one side."

After the Business Review

After the session, gen AI supports debriefing by drafting tailored recaps for participants, guiding self-reflection on how the review went in terms of both business content and team dynamics.

Create personalized summaries. Instead of sending the same meeting recap to all participants, gen AI helps produce tailored summaries for each person or function based on their role, contributions, and responsibilities.

- **Try this:** "Based on the meeting transcript [*share or upload*], draft a summary for [*specify*], including key decisions that directly affect their areas of responsibility and their follow-up actions."

- **Try this:** "Draft an email for [*specify*] with a short summary of the business review [*share transcript*] that outlines cross-functional dependencies so they know who they need to coordinate with."

- **Try this:** "Produce a recap for non-attendees [*specify*] that explains what was decided, why, and what they need to know."

Explore business implications. Gen AI helps participants think through business review decisions with reflective questions like: "What does this mean for our business?" and "What do we need to do differently to have better results?"

- **Try this:** "Guide us [*list members*] in analyzing the impacts of this decision [*specify*] made at the business review meeting on [*specify details*]. Ask each of us one question at a time."

- **Try this:** "Explain what the department [*specify*] needs to adjust or act on based on what was decided at the business review about [*specify*]."

- **Try this:** "Help me [*specify role*] identify what I should monitor or validate before the next review meeting, based on what was previously agreed [*share or upload*]."

- **Try this:** “Guide us, one question at a time, to evaluate whether the decisions [*share or upload*] require us to coordinate with other teams.”

Reflect on team dynamics. Running a better business review is not just about better content; it also means improving how people communicate with each other and work together. Gen AI helps participants reflect on how the meeting unfolded, leadership dynamics, quality of collaboration, and team performance. It can act as a coach, helping detect and manage soft signals like defensiveness, dominance, disengagement, or siloed behavior.

- **Try this:** “Guide us, one question at a time, to reflect on how communication styles and interpersonal dynamics shaped the flow, tone, and quality of the discussion during the business review [*link transcript or recording*].”

- **Try this:** “Create an executable prompt that participants can run with AI to help them reflect on how the business review went and what they could improve next time.”

- **Try this:** “Compare this business review [*link transcript or recording*] with the previous one [*link transcript or recording*] and identify recurring team dynamics. Summarize what’s improving over time and what is not.”

- **Try this:** “Based on the meeting transcript [*share or link*], guide us, one question at a time, in recognizing patterns that may limit team performance (for example, overtalking, lack of challenge, groupthink). Then, ask us to select one pattern and suggest ways to improve.”

CHAPTER 27

Project Review

Whether marketing, operations, finance, IT, or HR, every function runs projects that need oversight, progress tracking, and course corrections. Status reviews provide a formal checkpoint to assess whether projects meet objectives, budgets, and timelines. When done well, project reviews bring clarity, accountability, and a renewed sense of purpose. They help identify risks early and ensure that projects stay on track to deliver their intended outcomes.

Despite their importance, project reviews often fall into familiar pitfalls.[1] One of the most common is ineffective reporting—issues may be reported accurately, but in ways that makes them hard to find. Another is when project teams redefine deliverables (that is, by changing their contents) while keeping their original names. During project reviews, leadership or the project sponsor does not always challenge these distortions effectively. This is exacerbated when facilitation is poor or unable to manage power dynamics that hinder constructive discussion.

Discussions get bogged down in slide-reading. Participants may assume that numbers and charts reflect reality and view reports too optimistically. Critical or dissenting voices may be absent, increasing the chance of being blindsided later. Without clear follow-up, even a well-run project review risks becoming just another team conversation rather than a driver of alignment and execution.[2]

Gen AI makes project reviews more productive by creating project status reports, drafting agendas, documenting participants' feedback and decisions, and updating project plans accordingly. Beyond improving

productivity, AI helps raise the bar of discussion on items that are most critical for the project: problems that might adversely impact the project's timeline, budget, or deliverables. AI prompts the team to analyze risks, evaluate delays, explore corrective actions, and consider alternative strategies and their feasibility.

Before the Project Review

Generative AI supports the project team by creating the project status report, structuring focused review agendas and facilitation guides, and helping sponsors and reviewers prepare in advance for more productive discussions.

TABLE 27-1

How gen AI enhances project reviews

Team activity	Before	During	After
Project review	• Summarize project status • Create agenda items • Engage with content	• Review progress • Discuss mitigation actions • Suggest next steps	• Document the review • Update project plans • Prepare the next review

Summarize project status. Gen AI helps review and summarize the project's status in a report to be distributed to all participants. It helps gather information from multiple sources and highlight key items in visual formats (for example, tables with traffic-light indicators) that need the sponsor's attention.

Beyond structuring the content, gen AI also helps the presenter rehearse and refine key messages: What has changed since the last review, what needs escalation, and what decisions are required?

- **Try this:** "Using the latest updates from [*specify, for example, tool names, emails, reports*], create a one-page summary of the project's

status. Organize it into sections: [*specify, for example, progress achieved, blockers, key metrics, areas needing escalation*].”

- **Try this:** “Prepare a structured table summarizing achievements, status (with traffic-light indicators), gaps, corrective actions, and proposed next steps for the upcoming project review.”

- **Try this:** “Ask us questions, one at a time, that can help identify the top three issues that require management decisions at the next project review.”

- **Try this:** “Review my project status presentation [*upload your talking points or speak to the mic*] and act as a communications coach, helping me, the presenter, sharpen the key messages on what we need to discuss, decide, or escalate during the review with the sponsor.”

Create agenda items. Effective project review agendas will focus time and management attention on what matters most: critical decisions, unresolved issues, and high-impact topics. Gen AI helps the presenter structure the agenda, prioritize what deserves discussion, and guide how to facilitate each agenda point. This includes providing concrete tips, scripts, and examples to engage participants and foster healthy debate.

- **Try this:** “Based on this project status report [*share or upload*], recommend the optimal agenda sequence for a 60-minute review to prioritize critical discussions and decisions.”

- **Try this:** “Help me, the facilitator, identify which stakeholders should actively contribute to each agenda point [*share or upload agenda*] and what questions to ask to involve them.”

- **Try this:** “List three proven facilitation techniques, supported by key references, tailored for our next project review [*share or upload agenda*] to ensure engagement and constructive debate.”

Engage with content. Gen AI helps the project sponsor and other reviewers engage with project status reports before the meeting, ensuring that they arrive informed and ready to contribute. By walking them through the report, gen AI clarifies what is expected from them, whether that is commenting, addressing issues, or making decisions.

- **Try this:** "Create a tailored briefing for the project sponsor [*specify*] based on this status report [*share or upload*]."

- **Try this:** "Craft a copy-paste executable prompt that participants can run directly with AI to help them familiarize themselves with the content [*share or upload the status report*] before the next project review meeting."

- **Try this:** "Summarize the latest project status report [*share or upload*] I received from [*specify*]. Then, ask me questions to help me, as a participant [*specify role*], prepare for the next project review meeting. Ask one question at a time."

- **Try this:** "I received, as a sponsor, the latest project status report [*share or upload*], but I cannot participate in the next review meeting. Ask me questions, one at a time, about what I agree or disagree with, any red flags I notice, and any missing or unclear information. Based on my answers, draft an email I can send to the project manager summarizing my feedback."

During the Project Review

Generative AI can elevate team discussion during project reviews by focusing on what matters: problems, risks, and issues to solve. It can also accelerate the identification of solutions or mitigation actions, which are later documented as a list of concrete next steps.

Review progress. Project reviews often become an exercise of checking boxes: Slides are presented, but key risks remain hidden and corrective action happens too late. Gen AI helps make relevant information more visible and clearer during the review meeting, flagging areas needing

attention, issues that are slowing down progress, and problems requiring escalation to solve. AI can also act as the project's client or an external stakeholder, bringing new perspectives to enrich the discussion.

- **Try this:** "Analyze the project's progress against key milestones from the latest status update [*share or upload*] and list the top three delays needing our attention during today's review meeting."

- **Try this:** "Act as the project's client [*specify*] and review the status update [*share or upload*]. Identify where expectations are met, exceeded, or unmet."

- **Try this:** "Help me, the project sponsor, ask three smart, detective-style questions to the project team that will uncover any unspoken issues without sounding accusatory or putting them on the defensive."

Discuss mitigation actions. Project reviews often get stuck when discussion revolves around problems but fail to come up with concrete solutions. Decisions become vague ("We'll monitor this"), get pushed to later meetings, or are placed in a virtual parking lot. Gen AI helps anchor the discussion around concrete actions, provide examples and best-practice approaches, and even detect when a statement is ambiguous or vague (for example, from "We should look into it" to "[*The* o*wner*] will analyze options and present findings at the next review").

- **Try this:** "Summarize our discussion on [*specify issue or risk*] and list the mitigation actions we agreed on. Then, ask us two questions, one at a time, about their feasibility and impact."

- **Try this:** "Are there any alternative solutions or approaches we are overlooking? Challenge us by taking the perspective of [*specify*]."

- **Try this:** "Create a table of five AI action rephrasing rules (such as, replace 'let's look into it' with '[*the owner*] will report back by . . . ') that can help me, as facilitator, during the recap."

PROMPT FOR TEAM-AI DIALOGUE

Discuss Mitigation Actions Live

You (gen AI) guide our team that includes [*list members*] in identifying effective mitigation actions for the risks we are discussing.

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Summarize our discussion so far, listing all the risks in a table. Ask for confirmation, refinement, or addition of missing issues.

[*Step 2*] For each risk, suggest three different mitigation options and ask to select one. Proceed one risk at a time.

[*Step 3*] For each risk, briefly challenge our chosen options, taking the perspective of a skeptical stakeholder. Proceed one risk at a time. Wait for our feedback. Then suggest two alternative mitigation options for each risk.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

Suggest next steps. After reviewing the project status, discussing issues, and debating mitigation actions, you need to ensure that decisions lead to real, implementable follow-up. Gen AI turns AI-recorded or transcribed meetings into actionable next steps, clarifying what needs to be done, who owns it, and by when.

- **Try this:** "Ask us three questions, one at a time, that help you summarize today's discussion [*share or upload*] into concrete next steps with clear owners, deadlines, and measurable outcomes."

- **Try this:** “Help us, the project team, reflect on which decisions [*share or upload*] need follow-up and how to track them. Proceed one decision at a time.”

- **Try this:** “Help us, the project team, prioritize next steps that are most critical for project success. Ask us questions, one at a time, and guide us in the analysis.”

After the Project Review

When the project review is completed, gen AI helps the team document the discussion and decisions, updating their plan, and preparing for the next review.

Document the review. After a project review, decisions, open points, or feedback often get lost, delayed, or left unclear. Gen AI takes notes of all key decisions, discussion points, and action items in a structured format. It ensures that nothing is lost and that the review can be referenced later. Participants can also use AI to navigate the document according to their role, helping them focus on the points and action items most relevant to them.

- **Try this:** “Generate a structured summary [*specify format, for example, a table*] of the meeting [*share or upload*], including decisions, actions, and unresolved items.”

- **Try this:** “Craft a copy-paste executable prompt that each participant can run with AI to analyze the minutes or recordings [*share or upload*] of the project review. The prompt should guide the participant through key discussion points, decisions, and next steps, encouraging reflection and engagement.”

- **Try this:** “Act as the project owner [*specify*] and briefly illustrate for me the meeting summary [*share or upload*] and review my next steps.”

- **Try this:** “Based on the meeting’s minutes [*share or upload*], help me draft a personalized follow-up message to [*specify recipient*], summarizing their next steps.”

Update project plans. It’s essential that the project plan accurately reflects all decisions, actions, and changes agreed on during the project review. Gen AI can suggest which elements of the plan need updating and execute the changes in a Gantt chart and in the workstream activities. It can also help team members understand which changes to the plan are specifically relevant to their role.

- **Try this:** “Help me, as the project manager, identify which parts of the project plan [*share or upload*] need updating based on today’s decisions [*share or upload meeting minutes*].”

- **Try this:** “Help me understand the changes in the project plan [*share or upload*] that affect my role [*specify*] and suggest how I can communicate them to my team.”

- **Try this:** “For each change in the overall project plan [*share or upload*], ask us questions, one at a time, about how we plan to integrate them into our team activities.”

Prepare the next review. Getting ready for the next project review requires more than collecting input from each team member and updating the slide master deck (which is often done in a rush the day before the review). Gen AI not only accelerates and simplifies but also improves the quality of this process. For project managers, it suggests what needs to be reported and flags emerging issues that may require a sponsor’s attention. For participants, gen AI helps them reflect on their assigned actions and prepare for the next review.

- **Try this:** “Analyze the previous meeting’s notes [*share or upload*], and list all preparatory tasks for the next project review session and suggest discussion points to include in the agenda.”

- **Try this:** “Based on my role [*specify*] and assigned next steps [*share or upload*], ask me questions, one at a time, that help me prepare for the next project review meeting.”

- **Try this:** “Act as my mentor and help me reflect on how the previous review [*share or upload*] went, what objections the sponsor raised, and how I responded. Then, suggest what I could do differently at the next session.”

- **Try this:** “Ask us five questions, one at a time, to help us reflect on what didn’t work well in the last review and how to improve the next one.”

CHAPTER 28

Solution Review

Solution reviews (sometimes also called proposal reviews or prebid reviews) are structured meetings where a team critically evaluates a proposal before submitting it to a client, often as part of a competitive bid or commercial pitch. These reviews are common in sectors like consulting, technology, professional services, and B2B sales, where winning new business depends on the quality, clarity, and differentiation of the proposed solution. For example, a consulting firm might hold a solution review before submitting a proposal for a digital transformation project. A technology vendor could evaluate its bid for a client's new IT infrastructure. A marketing agency might review a campaign concept before pitching it to a brand. When done well, these reviews bring significant benefits: They help teams distill the key elements of their solution, validate alignment with client requirements, and sharpen the value proposition and differentiation before submission.[1]

However, solution reviews often fall short of their potential.[2] Sometimes, teams skip the review entirely or it becomes a mere process formality, a box to check, rather than an opportunity for rigorous evaluation and solution improvement. Reviews may lack discipline in terms of structure and evaluation criteria. They might not include the right participants, resulting in little real challenge. In other cases, the feedback shared during the review can be vague or nonactionable, or the discussion can fail to provide an objective assessment due to internal politics. As a result, proposals move forward with untested assumptions, weak differentiation, or misalignment

with what the client truly values, reducing the chances of telling a compelling story and winning the business.[3]

Gen AI can streamline solution reviews by structuring the agenda around the most important items that need discussion and then helping the team efficiently update or revise the solution. Beyond productivity, AI guides the team through a deeper evaluation of the solution, assessing the proposal's alignment with client requirements, challenging its uniqueness, weighing trade-offs, and ensuring that the pitch is compelling and persuasive.

TABLE 28-1

How gen AI enhances solution reviews

Team activity	Before	During	After
Solution review	• Distill key elements of the proposal • Define criteria and questions • Prepare the discussion	• Validate against requirements • Challenge for uniqueness • Consider trade-offs	• Capture discussion items • Revise solutions • Prepare to submit

Before the Solution Review

Gen AI helps participants review the content of a proposed solution by highlighting the most relevant elements and framing the key questions for discussion. This sets the stage for an effective review activity, where participants are prepared and ready to discuss the proposal's value and its alignment with client needs.

Distill key elements of the proposed solution. Participants often receive lengthy documents and struggle to focus on the essentials. Gen AI can distill the core narrative, value proposition, and differentiators into clear language, making it easier to grasp what truly matters.

- **Try this:** "Act as the owner of this proposal [*share or upload*] and present to us the key elements of the proposed solution."

- **Try this:** “Draft a one-page executive summary for [*specify audience*] that captures the main business outcomes and differentiators for our solution [*share or upload*].”

- **Try this:** “Help us transform the proposal content [*share or upload*] into a more engaging format [*specify, for example, podcast, storytelling narrative, situational pitch*] so that the reader [*specify*] can easily grasp the key points, core narrative, and value proposition in a more relatable way.”

Define criteria and questions. Gen AI helps prepare the session by defining clear evaluation criteria based on client requirements, proposing a set of questions that keep the discussion focused on the most important aspects of the proposal, and highlighting gaps or inconsistencies.

- **Try this:** “Based on the request for proposal [*share or upload*], help us identify the most important criteria to consider for our solution review [*share or upload*].”

- **Try this:** “Guide us to prepare for the review session by posing five key questions, one at a time, that will focus the discussion on the most important aspects of the proposal [*share or upload*], based on the client’s requirements and key decision drivers [*specify*].”

- **Try this:** “Draft a checklist for the review meeting to ensure that we address all gaps and pending items in our solution proposal [*share or upload*].”

Prepare the discussion. Too often, solution reviews begin without a clear structure; someone puts the proposal document on-screen, and the discussion drifts. Gen AI helps design a focused agenda that allocates time to the most critical topics, ensuring a disciplined, value-driven review.

- **Try this:** “Help us draft the agenda for reviewing the proposal [*share or upload*]. First, ask us two contextual questions, one at a time, about the key discussion points we want to address and suggest a logical sequence, and then detail the agenda items.”

- **Try this:** “Provide a set of guiding questions for the review session about [*share or upload solution proposal*] that helps manage participant dynamics, encourages engagement, and keeps the discussion productive.”

- **Try this:** “Simulate how the review session with [*specify participants*] about [*share or upload solution proposal*] might unfold, so we can anticipate dynamics and identify any adjustments needed before the session.”

PROMPT FOR TEAM-AI DIALOGUE

Prepare the Solution Review Session

You (gen AI) guide our team that includes [*list members*] in preparing the review session for our solution proposal [*share or upload*] addressing the client’s requests [*share or upload*]. Participants attending the review include [*list participants*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Based on the client’s requests, review our draft proposal and suggest five questions to debate. Wait for our feedback, then ask for our selection.

[*Step 2*] Draft a 60-minute agenda in table format that allows us to discuss the questions. Wait for our feedback, then finalize the agenda according to our goals and expectations.

[*Step 3*] Provide three practical recommendations for integrating generative AI as a sparring partner in our review session.

[*Step 4*] List three pitfalls we may encounter in our solution review session. Base your analysis on minutes, emails, and chats from past review sessions, if available, then invite us to share additional concerns.

[*Step 5*] Create a facilitator brief, including goals, guiding questions, agendas including use of generative AI, and pitfalls to avoid. Ask us to review and confirm.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don’t be pleasing.

- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

Visit hbr.org/book-resources to download an editable version of this prompt.

During the Solution Review

Gen AI helps review the proposal against a client's requirements, challenging its uniqueness, facilitating discussions about trade-offs, and capturing feedback in real time to revise the proposal.

Validate against requirements. Gen AI can guide participants through the review criteria and client requirements, checking whether the proposed solution meets each one. It can highlight where the solution is strong and where it is unsatisfactory and needs further refinement.

- **Try this:** "During the review of our proposal [*share or upload*], help us examine key client requirements and evaluation criteria [*share or upload*]. Proceeding one at a time, rate whether the solution fully meets it, partially addresses it, weakly covers it, or misses it entirely and explain your rating. Ask for our feedback before moving on."

- **Try this:** "Act as our client [*specify*] and evaluate whether our proposal [*share or upload*] meets key requirements [*share or upload*]. Provide your reasoning for each requirement, noting any areas of concern, perceived risks, or opportunities for differentiation."

- **Try this:** "Identify gaps or weak areas in our proposal [*share or upload*]. Wait for our feedback, then suggest ways to strengthen or refine the solution."

Challenge for uniqueness. While teams often evaluate their own solution through the same internal lens, gen AI helps inject an outside-in critique by

benchmarking against competitors or simulating clients' reactions. This supports the team in reflecting on what makes the solution stand out.

- **Try this:** "Analyze publicly available information to compare our proposal [*share or upload*] against the competitor's [*specify*] offerings. Begin by asking us for any missing intelligence or competitor insights you need. Wait for our answers. Then explain our differentiators and list the areas where our proposal may be weaker."

- **Try this:** "Ask us challenging questions, one at a time, on what makes our solution truly unique, difficult to replicate, and compelling for the client. Then, summarize what sets us apart in one paragraph."

- **Try this:** "Role-play as a skeptical client evaluating our proposal [*share or upload*]. Challenge our claims of uniqueness. Proceed one question at a time."

Consider trade-offs. Gen AI helps the team discern not only whether the proposal is appealing to the client but also whether it is realistic to deliver, guiding discussions on trade-offs, risks, and impacts across different functions.

- **Try this:** "Help us discuss trade-offs between what the client wants and what we can realistically deliver based on this proposal [*share or upload*]. Proceed one at a time. Encourage consideration of compromises and alternative approaches."

- **Try this:** "Act as [*specify*] and help us weigh the benefits and drawbacks of different pricing or delivery models. Proceed one at a time."

- **Try this:** "Simulate a scenario in which a key delivery constraint [*specify, for example, a resource shortfall*] challenges our proposal [*share or upload*]. Discuss with us how our proposal would perform under these conditions, identifying vulnerabilities and mitigation options."

After the Solution Review

The value of a solution review is only realized when teams act on the feedback from the meeting to improve the value of the solution. However, at the end of the review, teams often find themselves up against submission deadlines, with little time to integrate all the reviewers' input. Generative AI can accelerate the team's work during this last mile, helping revise the solution and prepare the pitch, ensuring readiness for client submission.

Capture discussion items. Gen AI can take notes and structure all key discussion elements shared during the review, suggesting how to incorporate feedback in the proposal and tracking outstanding questions to ensure that nothing important is missed.

- **Try this:** "Summarize the review outcomes [*share or link*] in three sections: key discussion points, decisions, and pending items."

- **Try this:** "Review the key questions [*share*] discussed at the proposal review session, and for each, indicate whether it was fully answered, partially answered, or remains open [*share or upload transcription or recording*]. Wait for our feedback, then suggest follow-up actions."

- **Try this:** "Based on the meeting transcript [*share or upload*], create a summary table with columns for evaluation criteria, status (fully addressed, partially addressed, needs improvement, or not addressed), key discussion points, and decisions."

Revise solutions. Gen AI helps speed up revisions of the proposed solution based on the discussion and feedback gathered at the review session.

- **Try this:** "Revise the proposal [*share or upload*] based on the review feedback [*share or upload*]. Clearly mark or flag the sections that need to be changed."

- **Try this:** "Suggest specific points to amend, including how to update them based on the agreed feedback from the meeting transcript

[*share or upload*].”

- **Try this:** “Based on the meeting transcript [*share or upload*], draft an email to participants summarizing the key revisions made, explaining the rationale behind each, and requesting final comments before the submission deadline [*specify*].”

Prepare to submit. The team’s work does not end when the proposal is ready for submission. Being able to pitch it in a compelling way is another differentiating element. Gen AI can coach the team in sharpening the narrative, preparing supporting materials, and ensuring that the client presentation is ready.

- **Try this:** “Based on the revised proposal [*share or upload*], guide us, one step at a time, to structure our client pitch, ensuring that it’s clear, differentiating, and resonating with the client’s needs.”

- **Try this:** “Create speaker scripts to make the opening and closing of our client pitch [*share or upload the proposal*] more compelling and persuasive.”

- **Try this:** “Based on the proposal [*share or upload*], anticipate client [*specify*] questions or counterarguments during the pitch. Wait for our feedback, then help us prepare answers.”

- **Try this:** “This is my pitch rehearsal [*upload or speak in the mic*]. Role-play as a specific client persona [*specify*] and provide feedback in terms of what resonated, what surprised, and what fell short, and suggest improvements.”

CHAPTER 29

Retrospective

Retrospectives are team activities that assess past work and extract learnings. Originally formalized in agile software development, they've spread well beyond product teams and evolved into a widely applicable format for team reflection used after sprints, projects, campaigns, or major milestones. Whether labeled as "lessons learned," "after-action reviews (AARs)," or "reflection workshops," the goal remains the same: to help teams pause, reflect, and improve. When done well, retrospectives are a key moment for learning and continuous improvement. Too often, however, they are skipped, rushed, or treated as a formality rather than an opportunity for reflection. When poorly facilitated, they may just turn into fingerpointing; at other times, they're so surface-level that no real learning occurs. And even when meaningful insights are captured, they often lack proper follow-through.

Gen AI can streamline retrospectives by structuring the session, preparing templates, collecting input, clustering themes, and documenting outcomes. It can also enhance participation and drive meaningful reflections. Acting as a neutral challenger, gen AI suggests overlooked issues, prompts exploration of real causes, and highlights sensitive topics that might otherwise go unspoken.

TABLE 29-1

How gen AI enhances retrospectives

Team activity	Before	During	After
Retrospective	• Structure the reflection • Prepare templates • Collect input	• Support facilitation • Cluster recurring themes • Prompt deeper reflection	• Consolidate outcomes • Plan for improvements • Check sentiment

Before the Retrospective

Prior to the retrospective session, careful preparation ensures participants are aligned and ready to contribute meaningfully. Gen AI can support this phase by structuring the reflection, creating templates, and guiding participants to provide thoughtful input in advance.

Structure the reflection. Too often, retrospectives are improvised without a clear frame. Yet the design of the reflection is what turns a retrospective from an unstructured conversation into a learning engine. Gen AI can help by designing a structured agenda. It can suggest an approach (for example, "Help me choose the most appropriate method for our team's retrospective"). Gen AI can also recommend facilitation tips to create honest dialogue, inviting participants to share what they are actually thinking rather than what they think the team wants to hear.

- **Try this:** "Describe the building blocks of the agenda of a well-run retrospective, referencing best practices, including framing, time allocation, and ground rules for open dialogue. Provide an example on [*specify*]."

- **Try this:** "Ask me about the goal and context of our retrospective, and based on my answers, help me design a 90-minute agenda, from opening to closing, including three guiding questions for each stage."

- **Try this:** "Suggest practical methods I can use as the facilitator to increase psychological safety during our retrospective. My goal

isn’t to force openness, but to uncover what’s really going on in a way that makes the team feel comfortable.”

Prepare templates. Gen AI can create a template that participants can interact with. It can assist in filling the template with step-by-step instructions, examples, and questions.

- **Try this:** “Generate a simple template to distribute to participants of a retrospective on [*specify*]. Then, provide a list of instructions and guiding questions for each section of the template.”

- **Try this:** “You are a facilitator helping me prepare for a retrospective. Ask me one question at a time about the project (for example, what went well, what could be improved, key learnings, and next steps), but feel free to ask a brief follow-up if something sounds important or unclear. After I answer all the questions, synthesize my responses into a table suitable for use as input in the retrospective meeting.”

- **Try this:** “Act as a facilitator of retrospectives and help me design a prework template for participants that feels engaging and reflective. To start, ask me three contextual questions and then suggest different creative formats and prompts that invite new perspectives.”

Collect input. Gen AI can guide each participant to reflect deeply on the retrospective topics, helping them consider multiple dimensions they might overlook. Then, AI can summarize the self-reflection exercise in a list of insights to share with the facilitator, who can analyze them with the support of gen AI.

- **Try this:** “Draft three plug-and-play prompts that participants can execute with AI before the retrospective session, helping them reflect on their experience and fill in this template [*share or upload*].”

- **Try this:** “Guide me in preparing for a retrospective on [*specify*] by asking questions, one at a time, based on this template [*share or upload*]. After each of my answers, briefly reflect back: Offer a different perspective I might not have considered; ask one follow-up question to push my thinking deeper.”

- **Try this:** “Analyze all the input received from participants [*share or upload*] in preparation for the retrospective session and consolidate by clustering recurring themes, highlighting key differences.”

During the Retrospective

Any team leader knows that the success of a retrospective hinges on more than just gathering feedback; it’s about transforming that feedback into meaningful action. Yet these sessions can often be hindered by lack of participation, superficial discussions, or unaddressed team dynamics. Gen AI helps the facilitator, not just by taking notes, but also in guiding conversations toward concrete action items rather than letting sessions end only with good intentions.

Support facilitation. Gen AI helps the facilitator create opening scripts that are welcoming, build psychological safety, and clearly communicate the retrospective’s purpose. During discussions, AI suggests ways to draw out quieter participants and manage tensions when conflicts arise. It keeps facilitators on track with timing and focus, while helping ensure that all voices are heard.

- **Try this:** “Generate a step-by-step facilitation script for the retrospective [*share or upload agenda*] about [*specify*] based on best practices.”

- **Try this:** “Provide three sample sentences to encourage contributions from quieter participants while avoiding putting people on the spot.”

- **Try this:** “Suggest two check-in activities I can run at the start of a retrospective to quickly gauge the team’s mood and create the right

mindset for open, constructive feedback. Keep them short (three minutes max), purposeful, and suitable for a remote team."

Cluster recurring themes. Gen AI helps synthesize and organize ideas, feedback, and suggestions that participants shared during the retrospective. By analyzing feedback and identifying patterns, it helps the facilitator elevate the discussion in real time.

- **Try this:** "Based on what we discussed so far, cluster similar points and identify the three main themes in a table format [*specify*]."

- **Try this:** "List the main opportunities we've identified so far; ask us questions, one at a time, that can help us address them with concrete actions."

- **Try this:** "Analyze the discussion so far and help me, the facilitator, identify ideas or themes that generate visible energy (for example, enthusiasm in tone, more voices piling on). Wait for my feedback, then suggest how I can reflect that back to the team to help them reach agreement on next steps (for example, 'I'm noticing a lot of excitement around this idea; should we prioritize that?')."

Prompt deeper reflection. In many retrospectives, feedback can be softened or incomplete, leaving important issues underexplored. Gen AI can act as a neutral challenger, drawing attention to perspectives or opportunities for improvement that were overlooked or discussed only superficially. It suggests probing questions that dig deeper into root causes and examines issues from different angles. It can list topics that were avoided, downplayed, or sugarcoated to examine what didn't work well and why and then drive toward specific improvement opportunities with actionable, concrete next steps.

- **Try this:** "Suggest three alternative perspectives or viewpoints to broaden our team's retrospective discussion."

- **Try this:** "Act as a constructive challenger: Review what we've discussed so far and point out areas where our thinking may be

incomplete or overly optimistic."

- **Try this:** "Based on previous meetings, emails, and chats, highlight any risks, perspectives, or themes you believe are missing or underrepresented in our discussion."

PROMPT FOR TEAM-AI DIALOGUE

Guide the Team During the Retrospective

You (gen AI) guide our team that includes [*list members*] through a structured, step-by-step retrospective reflection on [*specify*].

Follow these instructions to engage in a dialogue with us:

[*Step 1*] Ask us collectively, one question at a time, to describe the context, goals, and key dimensions to explore (for example, collaboration, delivery, decision-making).

[*Step 2*] Invite each of us, in turn, to share what went well. Wait for all our answers. Then cluster our responses and highlight potential repeatable strengths.

[*Step 3*] Invite each of us, in turn, to share what didn't go well and why. Wait for all our answers. Then cluster our responses and highlight potential avoidable issues.

[*Step 4*] Create a table with three columns: problem (what did not go well), improvement actions (two for each problem), and how to implement next time.

Guidelines:

- At the beginning, explain briefly the goal and structure of the dialogue.
- Anchor every point to the provided context. (If something is missing, state your assumption explicitly.)
- Challenge ideas constructively. Don't be pleasing.
- Be concise. Avoid filler.
- Always ask for feedback before proceeding to the next step.

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After the Retrospective

Gen AI helps consolidate the discussions and organize agreed-on actions to align the team. It supports turning feedback and ideas into a list of improvements for the future. It can also provide suggestions on team dynamics and engagement level.

Consolidate outcomes. Gen AI can assemble all inputs from live discussion and facilitator notes into a clear, structured summary: themes clustered into categories, tagged insights, and actions with related owners and deadlines. It can also create a visual representation of the discussion, such as word clouds or mind maps. Additionally, AI can generate reflection prompts that participants can use after the retrospective.

- **Try this:** "Act as session memory: help us retrieve who commented on [*specific topic or comment*] and provide exact quotes with [*specify level of detail: brief context or full conversation thread*]."

- **Try this:** "Based on the meeting minutes [*share or upload*], reconstruct the flow of what happened. First, summarize the main topics discussed in the order they appeared. Then, highlight the key arguments or perspectives that were raised, and explain the reasoning behind the final decision."

- **Try this:** "Guide us, one step at a time, to reflect on [*specific discussion topics or key outcomes*] and consider what this means for us [*specify function*] and what we could do differently in the future."

Plan for improvements. Gen AI helps transform opportunities discussed in the retrospective into actionable steps for future improvements. It can guide the team to prioritize actions and distinguish what can be implemented immediately versus what needs further discussion or alignment. Gen AI can make sure each next stop has clear ownership and can recommend timelines and a plan to monitor progress over time.

- **Try this:** "Help us create a prioritized list of improvement actions based on the meeting minutes [*share or upload*]. Then, ask for our

feedback and help us select which ones we can implement immediately."

- **Try this:** "Write a personalized recap email for [*specify participant*], considering their role [*specify*] and the actions, timelines, and accountability agreed during the retrospective [*share or upload*]."

- **Try this:** "Compare the retrospective summary and notes [*share or upload*] with earlier sessions on [*specify*]. What recurring themes or issues keep showing up? What progress have we made, and where are we stuck?"

Check sentiment. After a retrospective, gen AI supports both the facilitator and the team in different ways. For facilitators, it can review the session to detect sentiment trends, moments of tension, or disengagement, helping them understand how the session really went. For participants, it can prompt a quick reflection right after the session, helping them process how they felt and what stood out. This immediate feedback—both analytical and emotional—helps improve future retrospectives and makes the experience more meaningful for everyone.

- **Try this:** "Help us prepare a questionnaire to reflect on the retrospective process. Include five questions covering psychological safety, participation, contribution, usefulness, and actionability."

- **Try this:** "Act as a coach and guide me, one question at a time, through a reflection on the retrospective, starting with my overall experience and exploring what felt safe or unsafe, what I wish we'd discussed more, and what I'd change for next time."

SECTION SEVEN

New Activities with Generative AI

CHAPTER 30

New Team Activities That Are Created by Gen AI

Throughout this guide, we have explored how gen AI can enhance teamwork for planning, decision-making, ideating, problem-solving, and reviewing in teams. In each of these cases, gen AI has enhanced and improved traditional and well-established team activities. However, the potential of gen AI and teamwork doesn't stop there; it also enables entirely new kinds of team activities that did not exist before gen AI. Novel formats are now emerging, shaped by experimentation and early adopters and gradually being codified by pioneering organizations.

Drawing on real-world examples, this chapter introduces three new team activities that are created by gen AI: *prompt-a-thons* for ideation and learning, *AI role-plays* for problem-solving and rehearsal, and regularly scheduled "gen AI days" for experience sharing and review. Let's explore each of these formats to understand what they are, how they work, and how any team can begin experimenting with them.

Prompt-a-Thons

You're familiar with hackathons, which focus on building software through code in a concentrated burst of teamwork. Prompt-a-thons use a similar format to build prompts that tackle business problems. They are collaborative, hands-on sessions where teams learn to craft, test, and refine effective prompts. Unlike hackathons, prompt-a-thons don't require

participants to have technical skills. They're designed for cross-functional teams, from product managers to HR leaders, finance analysts to marketers, who want to explore how gen AI can elevate their work. The goal is to apply gen AI to real business situations, gaining confidence and capability through practical experience and expert support. Inspired and pioneered by Microsoft, an increasing number of organizations have been including prompt-a-thons as a new team format in their gen AI transformation, such as Deutsche Telekom, Axa, CBD, and academic institutions such as Harvard Business School and NYU Langone Health.[1]

Prompt-a-thons can accelerate gen AI adoption by turning passive curiosity into active capability. They help teams discover business-relevant use cases, from preparing for a marketing campaign to analyzing customer feedback. They foster cross-functional collaboration by breaking down silos and encouraging teamwork. And they support cultural change by shifting the mindset from "AI is for experts" to "AI is for everyone."

A set of effective practices is emerging alongside a few important caveats. The best sessions share similar patterns:

- They are grounded in real business challenges, not abstract exercises, ensuring relevance and immediate applicability.
- They bring together diverse roles and functions, encouraging richer dialogue and broader perspectives.
- They foster humans-AI collaboration, treating gen AI as a collaborative partner rather than a command-line tool. Prompts are shaped as questions and back-and-forth comments, not just as one-way instructions.
- They emphasize iteration and experimentation over perfection, allowing teams to focus on trial and error, learning, and refinement.
- They include reflection moments, helping participants internalize what they've learned and connect it to their work.
- They capture and share the most effective prompts, creating reusable assets that can be applied across teams and future sessions.

At the same time, there are common pitfalls that can undermine the value of a prompt-a-thon:

- Sessions can become too focused on prompt engineering, overlooking the importance of nurturing meaningful humans-AI interactions.
- They fall short when they are treated as one-off events without follow-up or integration into broader transformation efforts.
- They end up creating prompts that are not relevant for the business or do not resonate with daily operations, making it harder for employees to adopt and reuse them.
- They risk excluding valuable perspectives if they are limited to technical roles, rather than embracing the full spectrum of business expertise.

How gen AI enhances prompt-a-thons

Gen AI plays a role in prompt-a-thons that goes beyond generating outputs. It can actively support the team activity through "meta-prompting" (using gen AI to help design better prompts). Or it can act as a coach during the session (for example, explaining how to build an AI custom agent using zero-code tools). At the end of the session, it can assist with reflection by summarizing key learnings and generating personalized takeaways. Here are examples of prompts you can use during a prompt-a-thon to leverage AI as a co-organizer, co-facilitator, or coach for your team:

- **Try this** (before): "Help me, as the organizer, structure the agenda for a three-hour prompt-a-thon focused on [*specify goal*], with [*share or upload list of participants, with information about their role and function*]."
- **Try this** (during): "Help us, as a team, improve the quality of this ready-to-use prompt [*copy and paste the prompt*] by taking the perspective of the user [*specify*]. Make recommendations about what to improve and provide examples of alternative prompts."

- **Try this** (during): “Explain how to craft conversational prompts that trigger an ongoing dialogue with you (AI), rather than a one-off response. Provide examples of three AI prompts that ensure back-and-forth interaction between humans and AI on [*specify topic*].”

- **Try this** (after): “Help me reflect on the most valuable insights from the prompt-a-thon by asking sequential questions, one at a time, that guide me to identify key takeaways, connect them to my role, and define an actionable next step.”

AI Role-Plays

AI role-play is a new format that’s rapidly gaining traction across teams that are experimenting with AI more collaboratively. Enabled by the conversational and perspective-taking capabilities of gen AI, it allows teams to rehearse real-world interactions with synthetic personas that AI creates. While role-play has long been recognized as a powerful learning tool, it was rarely used at scale due to its impracticality. Traditional role-plays require human facilitators or actors, making them resource-intensive and difficult to standardize. Now gen AI makes it possible to simulate these interactions instantly, on demand and seamlessly, thanks to voice-to-voice features.

An AI role-play is characterized by its ability to take perspectives and respond dynamically. A sales team can rehearse a complex pitch with AI playing the role of a customer who raises concerns and tough objections. Procurement teams can simulate a negotiation with a supplier. Leaders can prepare for a high-stakes executive committee meeting by simulating the reactions of different members and anticipating points of conflict. This technique is also proving valuable in innovation and product development. Product development teams can simulate “voice of the customer” interviews with synthetic personas, helping them test ideas, gather reactions, and refine messaging before going to real consumers for feedback.

To see what team-AI role-play looks like in practice, let’s look at the case of a sales team rehearsing their commercial pitch. The team begins by providing AI with a proper briefing on the simulation scenario: Who is the customer (specifying company information) and what the role is (for

example, a senior buyer, a technical expert, a client's executive), what is the context, and what does the team want to achieve? When the simulation starts, the team interacts with AI as they would do with the real customer. AI responds in character, adapting its tone, content, and emotional nuance based on the briefing and any additional data the team provides. The team can rehearse handling objections as AI challenges the pitch and raises counterarguments from the client's perspective. After the role-play, AI can help reflect on the interaction, offering feedback and suggesting improvements for the pitch.

How to get started with your AI role-plays

The most effective AI role-plays are grounded in realistic scenarios. They work best when teams engage with AI in dialogue, ask follow-up questions, and reflect on the responses. At the same time, teams should be aware of limitations. AI personas aren't perfect simulators. Research shows they currently tend to overestimate interest in novel or unusual features.[2] For anything beyond early-stage, high-level trend detection, human research remains essential.

To make the most of AI role-play, teams must not improvise. They need to structure the prompt effectively, ensuring that AI understands not only the role and context, but also the type of interaction the team expects. Here are a few examples:

- **Try this:** "Act as a skeptical customer in a B2B sales meeting [*share or upload additional information, for example, a one-page brief*]. We, a multifunctional sales team [*specify*], pitch you our new offering [*specify*] and you react and challenge us. You initiate and role-play the customer."

- **Try this:** "We are a product development team [*specify*] and you are [*specify customer persona*]. Would you prefer product A [*specify features*] or product B [*specify features*]? Explain what features you would value most and why."

- **Try this:** "Challenge our presentation [*share or upload*] by taking the role of a senior executive [*specify*]. Ask us three tough questions

about business potential and feasibility, one at a time. Wait for our response before proceeding to the next one."

Gen AI Days

Artificial intelligence transforms various aspects of team collaboration, including experience sharing. As more organizations move along their gen AI transformation journey, a new kind of format is emerging: "gen AI days." These are short sessions organized with a regular cadence (weekly or biweekly), where teams come together to share how they're using gen AI in their daily work. We have come across "Frid-AI-ys" as well as "Wednesd-AI-ys," but notwithstanding the name, the common idea is simple: Dedicate one or two hours to experience sharing, risk anticipation, and collective learning around the use of gen AI.

"WEDNESD-AI-YS" IN ACTION

Every other Wednesday, the CIO of a consumer goods company gathers her team for what she calls "Wednesd-AI-ys": a one-hour stand-up where members take turns in a show-and-tell of their latest AI experiments. Each live demo becomes an opportunity for learning and compiling a library of reusable prompts or use cases. As the CIO recalls, "People need quality time and space for sharing experiences. We have no predefined agenda, but one simple rule: 'Bring your own prompt.'"

These sessions are not formal training. They are peer-led, practice-driven spaces where people show what they've tried, what worked, what didn't, and what surprised them. Some organizations keep it informal within a specific department, while others have begun to institutionalize gen AI days as part of a broader community of practice with rotating facilitators, shared prompt libraries, and cross-functional participation.

The format typically includes live demos or walkthroughs of gen AI use cases such as how someone used prompting to prepare for a business review, generate customer insights, or automate a repetitive task. Participants might show how they used gen AI to assemble a proposal for a bid or develop a report on a complex topic. Others might share how they built a simple AI agent. The session is interactive, with space for questions,

reflection, and discussion on how these examples could be adapted or scaled across teams.

The benefits of gen AI days are clear. They help build prompt literacy across roles, accelerate gen AI adoption, and come up with real use cases that are relevant to the organization. They foster a culture of experimentation and openness, where learning is shared and innovation is decentralized.

How to get started with gen AI days

To run gen AI days effectively, a few good practices are emerging. Sessions work best when they are grounded in real workflows, not abstract capabilities. It's important to keep them informal and inclusive, encouraging contributions from all participants, not just tech-savvy users. Reflection is key: What did we learn, what could we adapt, and what should we try next?

At the same time, there are caveats to watch for. Gen AI days can lose momentum and participation if not sponsored by leaders who should be actively involved showing their own demos. The days risk becoming passive if participants only watch demos without contributing their own experiences. And they miss their potential if there's no follow-up and no effort to capture, scale, or reuse what's been shared.

Gen AI itself can play a central role in making gen AI days more effective, not just as a tool being showcased, but as a co-facilitator of the session. It can help take notes, suggest prompts for reflection, and assist in synthesizing takeaways. For example, participants can ask:

- **Try this:** "Act as a facilitator and ask three questions to help our team surface unspoken fears, concerns, or anxieties that may be limiting our adoption of generative AI in this area [*specify*]. Ask one question at a time. Wait for our response before proceeding to the next one."

- **Try this:** "Challenge us by taking the perspective of [*specify*]: How can we take our AI experiments [*share or upload*] to the next level?"

- **Try this:** “Summarize our session and then ask me questions to help me reflect on how I can apply some of the prompts shared today in my team’s workflow.”

We’ve explored three emerging team formats—prompt-a-thons, AI role-plays, and gen AI days. But as gen AI adoption deepens, new team activities that AI makes possible will likely appear. We are only at the beginning of a new way of working, where humans and AI collaborate more effectively than before.

As we come to the end of this book, you have probably already tested many of these prompts in your team sessions and seen how a humans + AI way of working can make a difference. By developing this new capability, teams can unlock AI’s full potential—turning it from a simple tool into a true teammate. This book is a reference you can frequently return to depending on the activity at hand. Keep it handy in your team’s workspace and revisit the prompts whenever you need them. Remember to visit hbr.org/book-resources for editable versions of the team-AI dialogues. Most importantly, be deliberate in your practice: Make experimenting with AI a habit, integrate it intentionally into your team’s routines, and keep building the skills and practices that will make your team stronger over time.

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