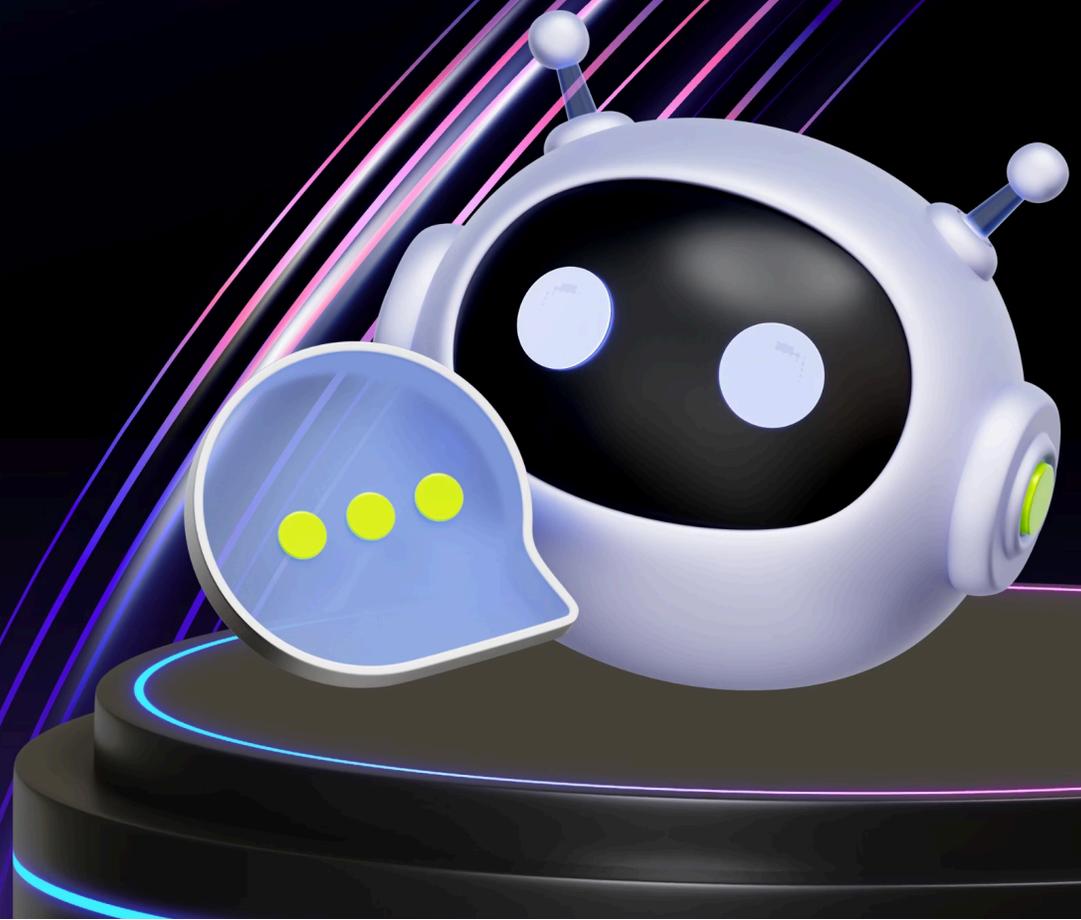


# LEADERSTACK

**THE GEN AI TOOL GUIDE FOR  
EVERY LEADERSHIP FUNCTION**

[www.gsdcouncil.org](http://www.gsdcouncil.org)



**1**

### **Perplexity AI**

**What it is:** An AI-powered search and research engine that pulls real-time information from the web with cited sources — unlike ChatGPT which relies on training data alone.

**Applications:**

- Real-time competitor intelligence and market landscape research
- Rapid executive briefing preparation before board meetings
- Tracking industry trends, regulatory changes, and macro signals
- Summarizing lengthy analyst reports into key strategic points

**Benefits:**

- Saves hours of manual research — delivers cited, up-to-date answers in seconds
- Reduces dependence on research teams for standard intelligence gathering
- Every answer comes with source links, so leaders can verify claims instantly
- Free tier is robust enough for daily strategic research needs

**2**

### **Gamma.app**

**What it is:** An AI presentation tool that converts bullet points, documents, or prompts into fully designed slide decks, one-pagers, and reports — no design skills needed.

**Applications:**

- Creating board presentations and investor decks from rough notes
- Building strategic roadmaps and executive summaries quickly
- Converting research outputs into visually compelling narrative documents
- Drafting internal strategy communications at speed

**Benefits:**

- Cuts deck creation time from days to under 30 minutes
- Maintains visual consistency without a designer in the loop
- Allows leaders to iterate rapidly — update the content, regenerate the design
- Free tier supports most executive use cases without a paid subscription

## 1

### Claude.ai

**What it is:** Anthropic's AI assistant, purpose-built for long-form reasoning, nuanced analysis, and handling complex, multi-part questions with high accuracy and context retention.

#### Applications:

- Scenario planning — "What are the risks of entering this market in the next 18 months?"
- Synthesizing 50-page strategy documents into executive summaries
- Drafting strategic memos, board letters, and leadership communications
- Stress-testing business decisions by arguing both sides of an argument

#### Benefits:

- Handles very long documents (up to 200,000 words in a single session)
- Particularly strong at structured reasoning — ideal for complex strategic questions
- Produces nuanced, balanced analysis rather than surface-level responses
- Free tier available; highly capable without needing enterprise subscription

## 2

### NotebookLM (Google)

**What it is:** Google's free AI research tool that lets you upload your own documents and have a fully informed conversation with them — it only answers based on what you upload, not the entire internet.

#### Applications:

- Uploading multiple analyst reports, whitepapers, or strategy documents and asking questions across all of them
- Creating a private AI assistant trained on your company's own strategy documents
- Summarizing lengthy research into key takeaways for leadership briefings
- Identifying contradictions or gaps across multiple documents simultaneously

#### Benefits:

- Completely free — no subscription required
- Answers are grounded only in your uploaded content, reducing hallucination risk significantly
- Ideal for confidential internal documents since it doesn't train on your data
- Can handle audio files too — upload meeting recordings and get instant summaries

# Marketing & Brand

1

## Jasper AI

**What it is:** An enterprise AI content platform trained to learn and replicate your brand's specific voice, tone, and messaging guidelines across all content types.

### Applications:

- Generating on-brand blog posts, email campaigns, ad copy, and social content at scale
- Maintaining brand voice consistency across multiple markets and writers
- Repurposing long-form content into social snippets, email subject lines, and ad variants
- Running A/B testing variations by generating multiple versions of the same message

### Benefits:

- Dramatically reduces time-to-publish for marketing teams — from days to hours
- Ensures brand consistency even across large, distributed marketing teams
- Integrates with marketing platforms like HubSpot and Salesforce
- Freemium model means teams can evaluate before committing to enterprise pricing

2

## Canva AI

**What it is:** The world's most popular design platform, now with deeply embedded AI features including image generation, background removal, text-to-design, and brand kit management.

### Applications:

- Creating on-brand social media graphics, presentations, and marketing collateral
- Generating AI images and visuals directly within design workflows
- Translating marketing materials into multiple languages with AI-powered localization
- Enabling non-designers to produce professional-quality brand assets independently

### Benefits:

- Removes the designer bottleneck for routine marketing asset creation
- Brand kits lock in colors, fonts, and logos — ensuring visual consistency at scale
- Free tier is generous; most marketing teams won't need the paid version for core use
- Massive time savings — a social media calendar's worth of assets can be created in one session

# 1

## Surfer SEO

**What it is:** An AI-powered SEO platform that analyzes top-ranking content in real time and tells your writers exactly what to include to rank on Google — keyword density, headings, word count, and topic coverage.

### Applications:

- Optimizing new and existing content to rank higher on search engines
- Briefing content writers with AI-generated outlines based on what Google rewards
- Auditing existing content for SEO gaps and improvement opportunities
- Scaling organic search content programs without growing the SEO team

### Benefits:

- Removes guesswork from SEO — gives writers clear, data-driven instructions
- Significantly reduces time from content idea to first-page ranking
- Works for teams with no SEO specialist — the AI does the technical analysis
- Freemium tier allows small teams to test the platform's core content optimization features

# 2

## HeyGen

**What it is:** An AI video generation platform that creates realistic avatar-based videos where a digital spokesperson delivers your script — no camera, studio, or video production team required.

### Applications:

- Personalized outreach videos where the AI avatar addresses each prospect by name
- Product demos, explainer videos, and customer education content at scale
- Translating video content into 40+ languages with AI-dubbed lip-syncing
- Internal communications from leadership delivered at scale without filming

### Benefits:

- Eliminates video production costs and timelines for standard communications
- Personalization at scale is proven to increase email response rates significantly
- Multilingual video content opens new markets without reshooting content
- Free tier supports evaluation; enterprise plans enable full-scale personalized campaigns

1

## Textio

**What it is:** An augmented writing platform specifically designed to identify and remove biased, exclusionary, or ineffective language from HR documents — job postings, performance reviews, and internal communications.

### Applications:

- Rewriting job descriptions to attract more diverse candidate pools
- Flagging biased language in performance reviews before they reach employees
- Ensuring consistency and fairness in promotion criteria documentation
- Improving offer letter language to increase candidate acceptance rates

### Benefits:

- Measurably improves diversity in hiring pipelines by removing language that deters candidates
- Reduces legal and compliance risk from discriminatory language in HR documents
- Provides real-time feedback as writers type — no separate review step needed
- Backed by research across millions of job postings, making its suggestions evidence-based

2

## Eightfold AI

**What it is:** An enterprise AI talent intelligence platform that maps skills across your entire workforce, identifies internal mobility opportunities, and supports strategic workforce planning.

### Applications:

- Skills-based workforce planning — understanding what capabilities you have vs. what you need
- Identifying internal candidates for open roles before going to external recruitment
- Succession planning by mapping leadership readiness across the organization
- Predicting flight risk and recommending targeted retention actions

### Benefits:

- Reduces recruitment costs by surfacing internal talent that would otherwise be overlooked
- Enables skills-based hiring — moving beyond job titles to actual capability matching
- Gives HR leaders a real-time view of workforce capability, not just headcount
- Particularly valuable for large organizations managing complex talent ecosystems

## 1

### Learnerbly

**What it is:** An AI-powered learning and development platform that matches each employee to personalized learning content — courses, books, podcasts, and coaching — based on their role, goals, and skills gaps.

#### Applications:

- Delivering personalized L&D pathways without a dedicated learning design team
- Upskilling employees for AI adoption with role-relevant content recommendations
- Replacing one-size-fits-all training programs with individualized development plans
- Tracking ROI on L&D investment through skills progression metrics

#### Benefits:

- Employees engage significantly more with learning that is relevant to their specific role
- Reduces the HR overhead of manually curating training programs for each function
- Supports the business case for L&D investment with measurable skills progression data
- Scales development programs without proportionally scaling the L&D team

## 2

### ChatGPT (for HR use cases)

**What it is:** OpenAI's general-purpose AI assistant, which with the right prompts becomes a powerful HR drafting and planning tool accessible to any HR professional without technical skills.

#### Applications:

- Drafting interview question banks tailored to specific roles and competency frameworks
- Creating onboarding plans, welcome emails, and new hire checklists in minutes
- Writing HR policies, employee handbooks, and process documentation
- Generating employee survey questions and analyzing open-text feedback themes

#### Benefits:

- Free tier provides substantial value — no budget approval required to start
- Dramatically reduces time spent on routine HR writing tasks
- Accessible to all HR team members regardless of technical background
- Produces quality first drafts that humans refine — not final outputs, but excellent starting points



1

## Julius AI

**What it is:** An AI data analysis tool where you upload any spreadsheet, CSV, or financial data file and simply ask questions in plain English — it runs the analysis and returns charts, summaries, and insights automatically.

### Applications:

- Uploading P&L data and asking "What are my top 5 cost drivers this quarter?"
- Running variance analysis between budget and actuals without writing formulas
- Generating financial summaries and visualizations for board presentations
- Scenario modeling — "Show me the impact on margin if revenue drops 15%"

### Benefits:

- Makes data analysis accessible to finance leaders without analyst support
- Eliminates hours spent on manual Excel modeling for standard analysis questions
- Produces presentation-ready charts alongside the analysis — not just raw numbers
- Free tier is genuinely useful for regular financial analysis tasks

2

## Workiva

**What it is:** An enterprise financial reporting platform with embedded AI that automates the preparation, review, and submission of financial statements, regulatory filings, and ESG disclosures.

### Applications:

- Automating the creation of SEC filings, annual reports, and earnings releases
- Maintaining data consistency across all financial documents with linked data
- ESG reporting — collecting, validating, and publishing sustainability disclosures
- Audit trail management — every change is tracked, versioned, and auditable

### Benefits:

- Eliminates the manual copy-paste process that creates errors in financial reporting
- Audit-ready by design — every change logged with user, time, and version history
- Reduces reporting cycle time by 40–60% for most finance teams
- Built specifically for regulated financial environments — compliance is a core feature

## 1

### Planful

**What it is:** A cloud-based Financial Planning & Analysis (FP&A) platform with AI that automates budgeting, forecasting, and financial narrative generation for finance teams.

#### Applications:

- Replacing manual Excel-based budgeting with a connected, AI-assisted planning platform
- Generating rolling forecasts that update automatically as actuals are posted
- Producing variance commentary and financial narratives for board reporting automatically
- Enabling driver-based planning — modeling how business KPIs translate to financial outcomes

#### Benefits:

- Drastically reduces the time finance teams spend consolidating budget submissions from departments
- Narrative generation means the story behind the numbers is produced automatically — not written manually
- Scenario modeling becomes interactive — adjust one assumption and the entire model updates
- Reduces dependence on a small number of "Excel heroes" who hold model knowledge

## 2

### ChatGPT Code Interpreter (for Finance)

**What it is:** A feature within ChatGPT that executes Python code in real time — allowing finance leaders to upload financial files and run sophisticated analysis, modeling, and visualization without knowing how to code.

#### Applications:

- Running statistical analysis on financial data — trend lines, correlations, outlier detection
- Building 3-scenario financial models (base, bull, bear) from uploaded data
- Creating publication-quality charts and graphs from raw financial data
- Automating repetitive calculations that would otherwise require an analyst

#### Benefits:

- Gives CFOs and finance directors analyst-level analytical power without analyst headcount
- Produces repeatable analysis — the same prompt on next quarter's data gives the same structure
- Code is shown alongside results — finance teams can learn what analysis was actually run
- Freemium access — available on ChatGPT Plus subscription, no enterprise contract required



# Customer Experience & Service

1

## Intercom (Fin AI Agent)

**What it is:** An AI customer support agent built into Intercom's platform that autonomously resolves customer queries using your knowledge base, product documentation, and past support tickets — without human intervention.

### Applications:

- Handling tier-1 support queries 24/7 without adding headcount
- Automatically escalating complex or sensitive queries to human agents with full context
- Answering repetitive product questions, billing queries, and how-to requests
- Reducing support ticket backlog by resolving a majority of standard queries instantly

### Benefits:

- Measurably reduces cost-per-ticket and increases first-response speed to near-instant
- Human agents are freed to handle complex, high-value interactions where judgment matters
- Customer satisfaction scores typically improve because response time drops dramatically
- Freemium tier allows teams to pilot the AI agent before committing to full deployment

2

## Gong.io

**What it is:** A revenue intelligence platform that uses AI to record, transcribe, and analyze every customer call and meeting — surfacing patterns in what top performers do differently and where deals stall.

### Applications:

- Identifying the most common customer objections and how top reps handle them
- Coaching customer service and sales teams based on actual conversation data — not opinion
- Tracking whether key messages are being delivered consistently in customer interactions
- Spotting early warning signs of churn through sentiment analysis in customer calls

### Benefits:

- Transforms leadership intuition into data — decisions about coaching and process are evidence-based
- New team members ramp faster because they can learn from recordings of top performers
- Eliminates the need for managers to sit in on calls to assess quality
- Provides a searchable library of every customer conversation — invaluable for product and strategy teams

# 1

## Freshdesk AI

**What it is:** Customer support software with deeply embedded AI features including automatic ticket categorization, suggested replies, sentiment detection, and agent assist tools.

### Applications:

- Automatically tagging and routing incoming tickets to the right team or agent
- Suggesting responses to agents based on similar resolved tickets — reducing handle time
- Detecting customer frustration in real time and flagging for priority handling
- Generating post-interaction summaries so agents don't have to document manually

### Benefits:

- Reduces average handle time significantly through AI-assisted response suggestions
- Improves routing accuracy — fewer tickets sent to the wrong team or bounced between agents
- Free and freemium tiers make it accessible to growing teams before enterprise budgets are available
- Scales support capacity without proportionally scaling headcount

# 2

## Otter.ai

**What it is:** An AI meeting transcription and intelligence tool that records conversations, produces accurate transcripts in real time, and generates summaries with highlighted action items automatically.

### Applications:

- Transcribing customer calls and extracting recurring themes, complaints, and requests
- Capturing meeting decisions and action items without a dedicated note-taker
- Building a searchable library of all customer conversations for voice-of-customer analysis
- Sharing meeting summaries with stakeholders who couldn't attend

### Benefits:

- Eliminates the cognitive load of note-taking — participants focus on the conversation
- Action items are captured consistently — fewer follow-ups fall through the cracks
- Voice-of-customer insights become systematic rather than relying on individual memory
- Free tier supports a meaningful number of monthly transcription minutes for most teams



# Legal & Compliance

1

## Harvey AI

**What it is:** An enterprise-grade AI platform built specifically for legal work — trained on legal language, case law, and regulatory frameworks to assist with complex legal tasks that general AI tools handle poorly.

### Applications:

- Contract review and redlining — identifying risk clauses, missing provisions, and non-standard terms
- Due diligence acceleration — reviewing hundreds of documents in hours rather than weeks
- Regulatory research — summarizing relevant regulations across multiple jurisdictions
- Litigation support — analyzing case documents and surfacing relevant precedents

### Benefits:

- Reduces outside counsel costs significantly by enabling in-house teams to handle more work independently
- Dramatically compresses due diligence timelines — critical in M&A and investment scenarios
- Purpose-built for legal — understands legal context, terminology, and risk in ways general AI cannot
- Enterprise-only, but the ROI against avoided legal fees is typically very fast

2

## Spellbook

**What it is:** An AI contract drafting and review tool that works directly inside Microsoft Word — making it accessible to legal and non-legal professionals without switching platforms.

### Applications:

- Drafting standard contracts from a description of the deal terms
- Suggesting clause additions and flagging terms that favor the other party
- Explaining legal language in plain English for business stakeholders
- Accelerating negotiation cycles by automating the redlining process

### Benefits:

- Works inside Word — zero learning curve for teams already using Microsoft 365
- Non-legal business leaders can review contracts with AI assistance before engaging legal counsel
- Reduces turnaround time on standard commercial contracts from days to hours
- Freemium tier allows legal teams to evaluate meaningfully before enterprise commitment

## 1

### Ironclad

**What it is:** An AI-powered Contract Lifecycle Management (CLM) platform that manages the entire contract process — from drafting and negotiation through to obligation tracking and renewal management.

#### Applications:

- Building a searchable repository of all organizational contracts with AI-extracted metadata
- Tracking renewal dates, payment obligations, and performance commitments automatically
- Workflow automation — routing contracts for the right approvals without manual coordination
- Reporting on contract risk exposure across the entire portfolio

#### Benefits:

- Eliminates the risk of missed contract renewals, price escalations, or untracked obligations
- Legal and procurement leaders get full visibility across the contract portfolio for the first time
- Reduces legal team involvement in routine contract administration — freeing them for complex work
- Particularly valuable for organizations managing hundreds or thousands of vendor and customer contracts

## 2

### NotebookLM (Legal use case)

**What it is:** Google's free AI research tool, used in a legal context to upload regulatory documents, policies, compliance frameworks, or legal precedents and ask questions directly against that content.

#### Applications:

- Uploading the EU AI Act, GDPR, or industry regulations and asking specific compliance questions
- Creating a private AI assistant for compliance teams to query internal policies
- Summarizing lengthy regulatory guidance documents into practical, actionable summaries
- Cross-referencing multiple regulatory documents to identify areas of overlap or conflict

#### Benefits:

- Completely free — available to every legal and compliance professional today
- Answers are grounded exclusively in uploaded documents, not general internet content
- Ideal for compliance training — teams can ask questions and test their understanding interactively
- No sensitive data leaves your session in a way that trains the model — suitable for confidential regulatory work



# Data & Analytics Leaders

1

## Julius AI

**What it is:** A conversational data analysis tool where you upload any data file — CSV, Excel, SQL export — and ask analytical questions in plain English, receiving charts, summaries, and statistical findings instantly.

### Applications:

- Executive self-serve analytics — leaders ask questions of data without waiting for analyst reports
- Exploratory data analysis — understanding a new dataset before formal analysis begins
- Creating data visualizations for presentations from raw files without a data team
- Running quick statistical checks — correlations, trends, outliers — on any dataset

### Benefits:

- Democratizes data access — business leaders answer their own questions without an analyst queue
- Produces presentation-ready charts alongside written explanations — not just raw output
- Significantly reduces the bottleneck between business question and data answer
- Free and freemium tiers make it immediately accessible without procurement process

2

## ThoughtSpot

**What it is:** An enterprise analytics platform with AI-powered natural language search — business users type a question like "What were our top 10 products by revenue in Q3?" and get an instant chart from live data.

### Applications:

- Enabling business leaders to query live data warehouses without SQL or analyst support
- Proactive insights — AI surfaces anomalies and trends before leaders think to ask
- Embedding analytics into business workflows so insights appear where decisions are made
- Reducing dependence on BI teams for standard reporting and ad hoc data requests

### Benefits:

- Transforms data from a technical asset into a business leadership tool
- Dramatically reduces the volume of ad hoc report requests to data teams
- Business users who previously avoided dashboards engage naturally with conversational search
- Reduces the time between a business question arising and a data-backed answer being available

# 1

## Tableau AI (Pulse)

**What it is:** Tableau's AI layer — called Pulse — that proactively delivers personalized data insights to business leaders via email or Slack, using natural language narratives rather than requiring them to log into dashboards.

### Applications:

- Automatically notifying leaders when a key metric moves significantly from expected range
- Delivering personalized morning briefings of relevant KPIs to each leader's inbox
- Explaining the "why" behind metric changes — not just flagging them
- Enabling data-driven cultures without requiring every leader to become a dashboard user

### Benefits:

- Leaders receive insights without having to seek them out — AI brings the data to them
- Explanatory narratives mean no data literacy is required to understand what happened
- Significantly increases the ROI of existing Tableau investment by extending its reach to non-technical executives
- Reduces the burden on data teams to manually create and distribute executive reports

# 2

## ChatGPT Code Interpreter (for Analytics)

**What it is:** ChatGPT's built-in code execution environment that runs Python data analysis in real time — allowing any leader to do sophisticated data work by describing what they want in plain English.

### Applications:

- Exploratory data analysis on any uploaded dataset — immediately identifying patterns and outliers
- Building and visualizing statistical models — regression, forecasting, clustering
- Creating publication-quality charts customized for executive presentations
- Automating repetitive data transformation tasks that normally require a data engineer

### Benefits:

- Analytics leaders can validate analyst work independently without knowing Python
- Accelerates exploratory analysis — test an analytical hypothesis in minutes rather than commissioning a project
- The code is transparent — every calculation can be reviewed, reused, or handed to engineers
- Available on ChatGPT Plus — accessible without enterprise infrastructure or data team involvement



# Product & Innovation

1

## Maze AI

**What it is:** A product research platform with AI features that automate the analysis of user interviews, usability tests, and survey responses — converting qualitative research into structured, actionable insights.

### Applications:

- Analyzing user interview transcripts to surface recurring themes and unmet needs
- Synthesizing usability test results into prioritized lists of friction points
- Generating research reports automatically from raw study data
- Accelerating research cycles to keep pace with fast product development sprints

### Benefits:

- Reduces research analysis time from days to hours — keeping insights current with development cycles
- Removes researcher bias from theme identification — AI surfaces patterns humans might miss or overweight
- Makes qualitative research scalable — teams can run more studies without adding research headcount
- Freemium tier allows product teams to pilot before committing to enterprise research programs

2

## Productboard AI

**What it is:** A product management platform where AI automatically processes and categorizes incoming customer feedback — from support tickets, sales calls, reviews, and surveys — linking themes directly to features on the roadmap.

### Applications:

- Automatically clustering thousands of customer feedback items into themes without manual tagging
- Connecting customer evidence directly to roadmap features — every priority has a customer reason
- Generating executive summaries of customer feedback for leadership reporting
- Tracking whether specific customer needs are being addressed as the roadmap evolves

### Benefits:

- Transforms the overwhelming volume of customer feedback into structured, prioritized intelligence
- Product decisions are backed by evidence — reduces internal politics in roadmap discussions
- Product leaders save significant time on feedback processing, focusing instead on decision-making
- Freemium tier available for smaller product teams before scaling to the full platform

## 1

### **v0 by Vercel**

**What it is:** An AI UI generation tool that converts text descriptions or sketches into working front-end code and visual prototypes — enabling product managers to create realistic mockups without a designer or engineer.

#### **Applications:**

- Rapidly prototyping new product features to validate concepts before development investment
- Creating interactive mockups for stakeholder and customer feedback sessions
- Generating UI options to brief designers — showing intent rather than describing it abstractly
- Building internal tools and dashboards without a development team

#### **Benefits:**

- Compresses the time from product idea to visual prototype from weeks to hours
- Reduces the cost of design iteration — generate 10 variations of a UI in the time it took to create one
- Enables product managers to communicate vision more concretely to engineering and design teams
- Freemium tier makes it accessible to every product professional immediately

## 2

### **Elicit.org**

**What it is:** A free AI research assistant that searches and summarizes academic papers, market research, and studies — helping product and innovation leaders make evidence-based decisions.

#### **Applications:**

- Researching whether there is scientific evidence for a product hypothesis before investing in development
- Synthesizing competitive academic research on user behavior, technology, or market dynamics
- Rapidly reviewing the state of research on any topic relevant to a product decision
- Building evidence-based business cases by grounding arguments in peer-reviewed data

#### **Benefits:**

- Completely free — accessible to every product team without budget approval
- Searches academic databases that general AI tools don't reach
- Saves days of literature review — synthesizes findings from dozens of papers in minutes
- Produces structured comparison tables across multiple studies — ideal for rigorous product research

## Zapier AI

**What it is:** A no-code workflow automation platform with embedded AI — allowing operations teams to build automated processes that connect thousands of business applications and trigger actions based on AI-interpreted inputs.

### Applications:

- Automating data transfer between systems — CRM to ERP, support tickets to project management
- Building AI-triggered workflows — an email arrives, AI categorizes it, routes it, and creates a task automatically
- Eliminating manual handoffs between departments by automating the connective tissue of operations
- Creating AI agents that monitor systems and take actions when defined conditions are met

### Benefits:

- Operations teams eliminate entire categories of repetitive manual work without engineering resources
- Connects 5,000+ business applications — most operational systems can be linked without custom development
- Freemium tier is genuinely powerful — many operational workflows can be automated at zero cost
- Reduces human error in data transfer and process execution across high-volume operational tasks

# 1

## o9 Solutions

**What it is:** An enterprise AI platform for integrated business planning — connecting demand forecasting, supply chain planning, and financial planning in a single AI-powered model.

### Applications:

- AI-driven demand sensing — predicting demand changes before they appear in orders
- Supply chain scenario modeling — simulating the impact of supplier disruption, tariffs, or demand spikes
- Aligning supply chain decisions with financial outcomes in real time
- Reducing inventory carrying costs through more accurate AI-generated forecasts

### Benefits:

- Replaces disconnected Excel-based planning processes with a single connected AI model
- Demand forecast accuracy improvements directly translate to reduced inventory costs and fewer stockouts
- Leadership gets real-time visibility into supply chain risk before it becomes a crisis
- Particularly valuable for organizations with complex, multi-tier global supply chains

# 2

## Microsoft Copilot (Teams)

**What it is:** Microsoft's AI assistant embedded across Teams, Outlook, Word, and Excel — providing meeting summaries, action item extraction, document drafting, and data analysis within the tools operations leaders already use daily.

### Applications:

- Generating full meeting summaries and structured action item lists automatically after every Teams call
- Drafting operational status reports and cross-team updates from notes or data
- Answering questions about past meetings — "What did we decide about the supplier contract in last Thursday's call?"
- Analyzing operational data in Excel using natural language — no formula knowledge required

### Benefits:

- Zero workflow disruption — AI is embedded in tools leaders use every day, not a separate platform to adopt
- Meeting intelligence means no decisions or commitments are lost after complex operational discussions
- Reduces the administrative burden on operations leaders — routine writing and summarization is handled by AI
- Available as a Microsoft 365 add-on — no separate procurement process for organizations already on M365

# CERTIFIED GENERATIVE AI FOR LEADERS



## ABOUT GSDC CERTIFICATION



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