

AI + COLLABORATION

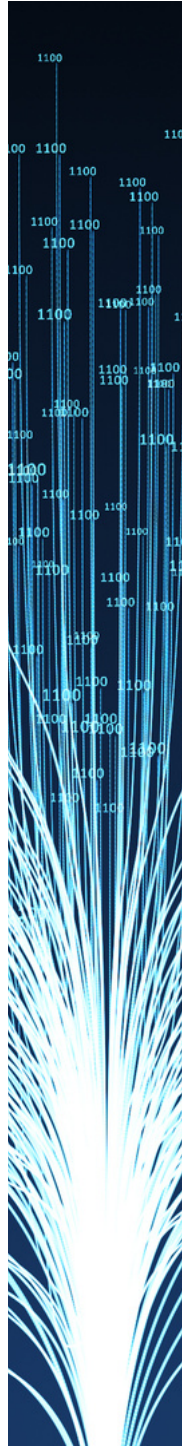
A Guide to Working as a Team with AI support.



Simon Powers & Malika Desai

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“If you want to go fast and far, then start collaborating with AI and a good facilitator!”

01 Why AI + Collaboration Now

Great things in business are never done by one person; they're done by a team of people. Steve Jobs – Inventor & Former CEO of Apple

We are at a pivotal moment.

Artificial Intelligence has matured beyond novelty. It's not just for tech leads or data scientists anymore.

In boardrooms, cross-functional teams, and client workshops, AI is starting to influence how we make decisions, explore new ideas, and respond to complexity. But most of the time, it's still a solo activity, something one person uses in the background, while the team continues as it always has.

Many organisations are now investing in AI Centres of Excellence. They're hiring AI leads, forming innovation task forces, and running internal pilots.

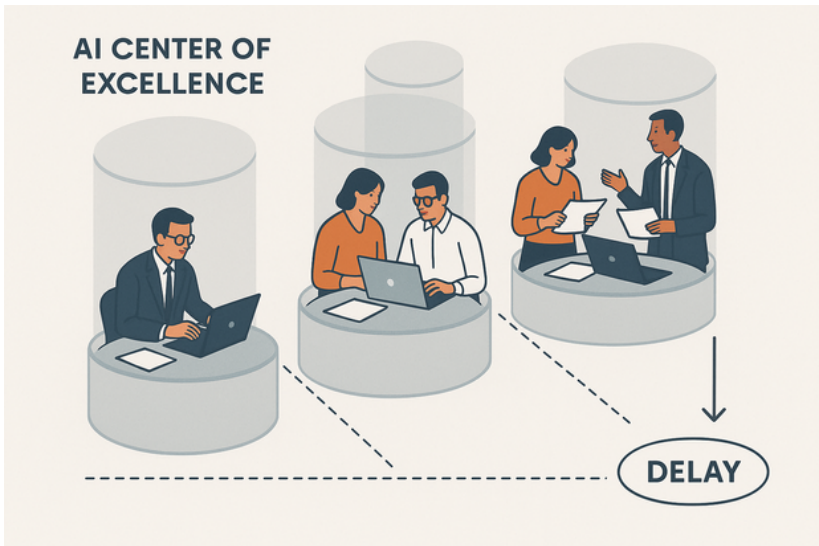
But the uncomfortable truth is that they still don't know how to bring AI into the real work, where the messy, everyday collaboration of strategy meets operations, where ideas compete, and decisions are negotiated.

Too often, AI sits on the sidelines. A product manager might use ChatGPT to clean up meeting notes. A coach drafts some learning prompts. A consultant experiments quietly with RAG or agents late at night.

Useful, yes. But disconnected from the team.

This is the missed opportunity. Because if AI remains a private productivity boost,

it will never transform how we learn, think, and decide together. As always, I am interested in organisational improvement, not just individual productivity (a local optimisation that can slow the whole system down).



When we keep AI confined to private prompts and individual insight, we reinforce silos. We double up on effort. We generate smart-sounding outputs that no one else can trace or trust.

We leave collaboration, the human bit, unchanged.

This creates silos of productivity that are slowed down by human verification, transfer of ideas, and then decision-making.

But what if teams learned to use AI together?

What if instead of working in parallel, we prompted side by side?

Imagine this: a team gathers around a big question. The future product strategy, change program, or proposed L&D initiative.

Collaborative AI

Solving Complex Problems Together



One person writes a first prompt. The team reads the response aloud. People critique, refine, and challenge. Sometimes prompting on their own devices, sometimes together sharing their screens. The group learns not just about the topic by seeing deeper insights together, but about how they think, together, as well as better ways to use AI.

This is AI as a thinking partner. Not just for one person. For the whole team. This is what we have been playing with, exploring, and seeing amazing results. Several trends make this the right moment to shift how we work:

AI tools are finally accessible.

You don't need to code or have a data science degree to explore with ChatGPT, Gemini, or Claude. Just curiosity, and a willingness to try.

Meanwhile, organisations are under pressure. **Organisations need faster alignment**, between strategy, operations, and culture.

Complexity outpaces any one person's ability to manage.

We're saturated with data, change, and decision fatigue.

The old approach: waiting for someone with AI expertise to arrive and guide us (think centres of excellence) is too slow. Teams that learn to think with AI now will move faster, create deeper insight, and reduce risk.

This is a new kind of collaboration. It's less about getting the "right answer" and more about testing, refining, and learning out loud. It's less about individual ownership and more about group sense-making. It's less about having the best idea, and more about making ideas better together.

The rest of this book will show you how.

- We'll explore how teams learn together.
- How to bring AI into that process—not as a black box, but as a visible, adaptable part of your working culture.
- You'll see how to structure prompts collaboratively, how to build shared practices, and how to avoid common traps.
- We'll even guide you through building your own AI assistant from your own work, so the tools grow with you.

You don't need to be an AI expert.

But you do need to be willing to experiment, to work in the open, and to listen, both to your team and to the machine.

Because this isn't just about AI.

It's about reclaiming collaboration with a smarter, shared set of tools.

02

How Humans Learn and Work Together

You don't build a business. You build people, and people build the business. Zig Ziglar – American Author & Motivational Speaker

Before we talk about AI, we have to talk about us.

Because real collaboration is not as simple as putting smart people in a room. It's emotional, social, contextual, and surprisingly fragile.

In most teams, you'll find a mixture of histories, habits, assumptions, and roles. People bring different levels of confidence, language fluency, and tolerance for ambiguity. They process information differently. They make sense of complexity in different ways. And they often struggle to speak openly about it.

Yet when teams work well, something magical happens. Insight compounds. Meaning emerges. There's a sense of momentum and collective confidence. We call this high performance, but it's not the result of pressure. It's the outcome of shared attention and trust.

The Foundations of Effective Collaboration

Humans work best together when we have:

- ✓ **Psychological safety:** the belief that you won't be punished or humiliated for speaking up.
- ✓ **Shared purpose:** a sense that what we're working on matters, and we all understand why.
- ✓ **Clear roles and rituals:** not rigid but defined enough that we know how to contribute.
- ✓ **Cognitive diversity:** different ways of thinking, welcomed and integrated.
- ✓ **Time for sense-making:** space to reflect, compare mental models, and align.

These conditions aren't just theoretical. They are reflected in practices like Liberating Structures, which invite inclusive participation without needing a facilitator to hold the room. Tools like 1-2-4-All, What, So What, Now What?, or Ecocycle Planning create space for different voices to emerge.

Similarly, Training from the Back of the Room reminds us that learning is social, active, and constructed in context. People don't just absorb information, they make meaning through doing, talking, and reflecting. This has implications for how we introduce AI to teams: not as something to be 'explained' but something to be played with, reflected on, and adapted together.

Facilitation skills become more critical in this environment, not less. Keeping everyone on track, drawing out quiet voices, managing divergent and convergent thinking, these are the invisible arts that make visible thinking possible.

Coaching questions can be used to deepen inquiry and open up new frames. Instead of "What should we do?" we might ask "What are we not seeing?" or "Whose voice is missing here?" These questions work just as well when prompted to a language model as when posed to a team.

Sam Kaner's Diamond of Participatory Decision-Making, which models the arc of collaborative dialogue: expanding the space of ideas, exploring tension and ambiguity, and then condensing towards resolution. It's a useful lens for collaborative prompting too; early prompts can expand, mid-rounds can explore contradictions, and later prompts can help distill insight.

In real life, these conditions are often patchy. Meetings are rushed. Agendas dominate. Disagreement gets smoothed over or avoided. People bring half their attention because their inboxes are on fire. Still, most teams do their best with what they've got.

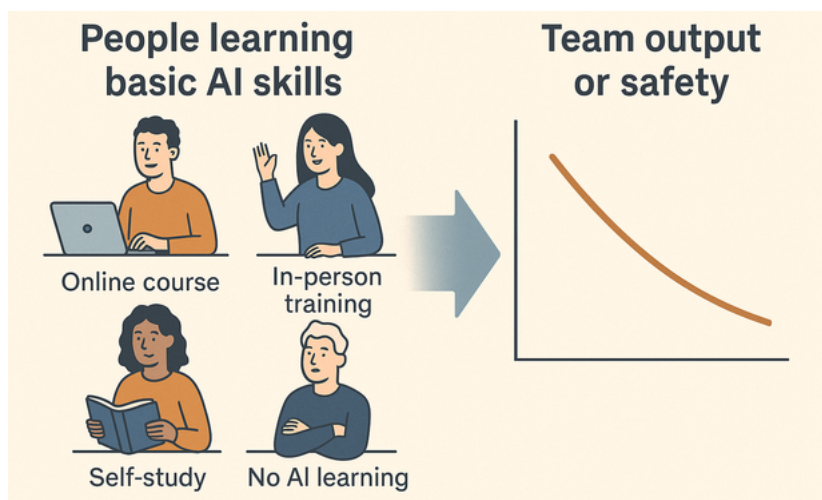
But imagine what happens when we add AI into that environment. Not as a sideshow, but as a thinking partner. A voice in the room. A tool that helps the team reflect faster, explore more, and reach shared understanding more effectively.

Not Everyone Learns the Same Way

As AI becomes part of how teams think and work together, we're beginning to see a new kind of skill divide emerge. There will be a noticeable difference between those who take the time to develop basic AI fluency, and those who don't. It's not about becoming a prompt engineer or understanding the internals of large language models. It's about learning enough to participate meaningfully in AI-enabled collaboration.

People who know how to experiment with prompts, reflect on outputs, and adjust based on team feedback will contribute more effectively in these new environments. Those without those skills may feel left behind or struggle to engage. This isn't a judgement, it's a real and growing dynamic.

Much like digital fluency became essential over the past decade,
AI fluency is the new baseline for collaborative work.



Without consistent learning in how to collaborate or use AI, team output and safety drops.

The good news? These skills are learnable, fast. But they need to be made visible and accessible, not assumed. That's part of what this book and the accompanying course aim to offer.

Some people think aloud. Others process quietly and need time to reflect. Some like structure. Others thrive in messy ideation. Collaboration needs to make space for these differences.

AI, when used well, can support this. It can summarise divergent ideas. Translate complexity into plain language. Offer fresh metaphors or angles. Slow down fast talkers. Speed up hesitant ones.

It becomes a kind of shared cognition, a way of thinking together without one person dominating the process.

Collaboration Isn't Just About Agreement

In fact, some of the best collaborative moments come from disagreement. When someone says, "I don't see it that way," and the group pauses. When a prompt produces something strange, and we ask, "Why did it do that?"

These moments are openings. They invite inquiry, refinement, and learning. But only if the group is ready. Only if the culture allows for it. Only if a facilitator picks up on it.

That's why AI doesn't replace team collaboration. It depends on it.

It depends on our ability to:

- Notice and name differences in how we think
- Stay curious when things don't match our expectations
- Reflect openly, and refine together

That's the foundation for what comes next.

Because in the next chapter, we'll start using AI, not just as a helper, but as a visible part of the team's thinking process.

"If you want to go fast, go alone. If you want to go far, go together."- African proverb



If you want to go fast and far, then start collaborating with AI and a good facilitator

03

What Happens When You Add AI to the Mix



We are entering a world where we will learn to coexist with AI, not as its masters, but as its collaborators. – Mark Zuckerberg, CEO of Facebook.

When a team starts working with AI, something shifts.

Not instantly. Not magically. But meaningfully, if you approach it with the right mindset and structure.

Because adding AI into collaboration isn't like adding another tool. It's more like adding another participant, one that's fast, unpredictable, sometimes brilliant, occasionally wrong, but always available.

When teams learn to work with AI together, they unlock a new rhythm of thinking. It's faster. It's more generative. And it often surfaces insights that wouldn't emerge from human conversation alone.

Speed, Scale, Synthesis

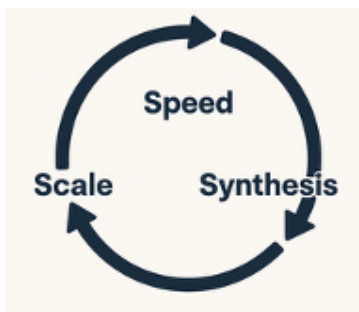
The benefits show up early:

- ✓ **Speed:** AI can write, rewrite, reframe and suggest in seconds. Teams no longer get stuck rewriting the same paragraph or summarising stickies.
- ✓ **Scale:** It can scan vast documents, summarise long meetings, or translate multiple perspectives simultaneously.
- ✓ **Synthesis:** Perhaps most powerfully, AI can bridge gaps in understanding. It can find the common thread between diverse inputs or expose where no such thread exists.

This doesn't replace critical thinking, it accelerates it. It gives teams more to react to, more quickly.

It also brings some unique superpowers:

- **Memory:** AI can retain detailed context across a session and even between sessions, depending on the tool.
- **Customisation:** It can be tuned with your team's specific language, documents, and frameworks (we'll explore this in the "Build Your Own Bot" chapter later in the book).



But There Are Risks

AI isn't neutral. It can hallucinate. It can reinforce bias. It can offer confident nonsense in a tone that sounds authoritative.

Used casually, this can derail collaboration. Teams might over-trust AI output, or default to whatever sounds polished. The result? Shallow consensus, groupthink, or a false sense of progress.

That's why using AI collaboratively must be built on a foundation of **critical engagement**. Teams need to treat the AI like a junior team member with flashes of genius, helpful, but not unquestioned.

This requires a culture of:

- Pausing to reflect on responses
- Asking “what’s missing here?” or “does this actually help us?”
- Encouraging critique without ego

Shared Prompting: A New Team Skill

Most people still prompt in isolation. They write a question, get a reply, and tweak it silently.

In team settings, prompting becomes a shared activity. The group discusses the intent. They shape the wording together. They test the AI’s response out loud. They iterate, not alone, but as a unit.

This builds alignment faster. It makes the reasoning visible. And it strengthens team learning.

Shared prompting also helps surface the group’s assumptions. When people disagree on how to ask the question, they’re often revealing deeper differences in how they see the problem.

This is gold. It turns prompting into a diagnostic tool.

AI Doesn’t Replace People: It Elevates the Process

AI doesn’t replace curiosity, intuition, or relational wisdom. It doesn’t replace strategy or judgment.

But it does give teams a new kind of momentum. It turns hesitation into exploration. It turns silence into output. It makes it easier to keep going when the conversation gets stuck.

Used well, AI becomes an amplifier for shared intelligence.

Sidebar: Shared Prompting Tips

How to Phrase, Evaluate, and Revise Prompts as a Team

- ✓ **Start with Intent:** Before typing anything, ask aloud: What are we really trying to find out? Clarity of purpose sharpens the prompt.
- ✓ **Use Roleplay:** Try beginning prompts with “Act as...” to shape tone and perspective. For example, “Act as a strategy coach...” or “Act as a sceptical stakeholder...”
- ✓ **Be Iterative:** Don’t aim for the perfect prompt on the first try. Try, evaluate, revise. Involve the group in deciding what to tweak.
- ✓ **Show Examples:** If you want a certain tone or structure, provide a short example. AI mimics patterns better than vague instructions.
- ✓ **Question the Output:** Ask the group, “Does this response help us?” or “What feels missing?” Keep AI in service of team learning, not as the final word.
- ✓ **Rotate the Prompt Driver:** Let different people take turns entering prompts. It surfaces different mental models and expands group capability.

Can Teams Collaborate with ChatGPT?

A common question is whether ChatGPT (or similar tools) can be used collaboratively by teams. Right now, ChatGPT itself doesn't offer native support for multi-user project spaces with shared context or memory across users.

That said, there are several practical workarounds:

- **Shared access:** Teams often use a shared login or screen during live sessions.
- **Custom GPTs:** These can be tailored to your content and used across a team, though memory and version control are still limited.
- **AI-augmented platforms:** Tools like Notion AI, Miro + AI, and Taskade integrate AI into collaborative spaces, allowing real-time co-editing.

For more robust collaboration:

- **Build your own RAG chatbot:** This approach supports shared memory, role-based access, and team-based training on your actual documents and language. (Covered in detail in Chapter 7.)

We're still early in the journey toward fully integrated team-AI collaboration environments. But even today, teams that learn to share prompting, reflect together, and embed AI into their workflows will hold a meaningful edge.

In the next chapter, we'll get into the practical techniques: how to structure group sessions, rotate prompting roles, and design formats that make AI a visible part of collaborative work.

Because the tool is here. The question is how we'll use it.

04 Practical Tools for Using AI in Groups

“It’s going to be interesting to see how society deals with artificial intelligence, but it will definitely be cool.” - Colin Angle

AI can be a quiet revolution in team settings, but only when used intentionally. It’s not enough to invite it into the room. The real magic happens when it’s woven into the fabric of your collaboration.

This chapter gives you practical structures, facilitation moves, and role-based patterns for using AI effectively in real-time group work. Whether you’re facilitating a strategic planning session or running a design sprint, these tools will help you make AI a visible, useful participant.

Facilitating Group Prompting

Facilitating with AI means involving the group in shaping the questions you ask. Instead of a single person writing prompts privately, the facilitator helps the group:

- Clarify their intent
- Agree on the wording
- Review and interpret the output
- Iterate as needed

This process turns prompting into a collective sense-making activity. It brings alignment before the question is even asked.

The Shared Prompting Loop: Role Rotation for Group AI Sessions

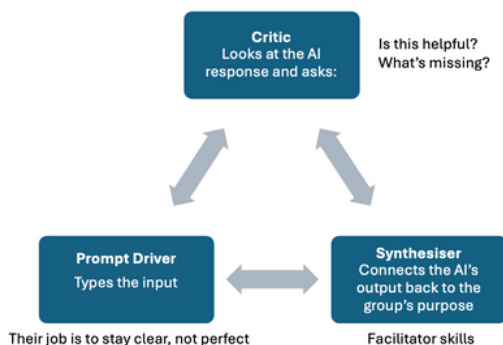
To avoid one person becoming the “AI whisperer,” rotate roles using a lightweight structure called The Shared Prompting Loop. This model distributes responsibility and grows shared prompting fluency.

This is the pattern we created whilst working with teams using AI.

- **Prompt Driver:** Types the input. Their job is to stay clear, not perfect.
- **Critic:** Reviews the AI response and asks, “Is this helpful? What’s missing?” or “What might we improve?”
- **Synthesiser:** Connects the AI’s output back to the group’s goal, summarising what matters most.

These roles help teams stay focused, avoid confusion, and improve the signal-to-noise ratio. Prompting becomes less about one person's clever input and more about collective inquiry.

The Shared Prompting Loop



Collaborative Prompt Formats

Here are some real-world formats where shared prompting shines:

- **Design Sprint + GPT:** Use AI to generate “How Might We” questions, scan research insights, or synthesise early prototype feedback.
- **Retrospectives:** Feed anonymised notes into GPT and ask it to surface patterns, tensions, or unseen dynamics. Let the team critique or validate the results.
- **Strategy Alignment:** Co-develop prompts like “Summarise our current blockers from the last three meeting notes” or “What are three emerging priorities given our OKRs and feedback data?”
- **Coaching Circle:** Ask GPT to simulate coaching questions based on someone’s challenge statement. Let the group reflect on which ones resonate most and why.
- **Breakout Room Learning:** Set up breakout groups, each with an AI-enabled screen. Have each group experiment with prompting based on a common challenge or theme. Groups then reconvene to share what they learned, how they used AI, and what results they got. These collective insights can then be summarised—by humans and AI—and turned into team-wide knowledge.

Collaborative Prompt Formats



Design Sprint + GPT

Use AI to generate 'How Might We' questions, scan research insights, or synthesise early prototype feedback.



Strategy Alignment

Co-develop prompts like 'Summarise our current blockers from the last three meeting notes' or 'What are three emerging priorities given our OKRs and feedback data?'



Retrospectives

Feed anonymised notes into GPT and ask it to surface patterns, tensions, or unseen dynamics. Let the team critique or validate the results.



Breakout Room Learning

Set up breakout groups, each with an AI-enabled screen. Have each group experiment with prompting based on a common challenge or theme. Groups then reconvene to share what they learned, how they used AI, and what results can then be summarised—by humans



Coaching Circle

Ask GPT to simulate coaching questions based on someone's challenge statement. Let the group reflect on which ones resonate most and why

Facilitation Moves that Work

- Show the AI's Thinking: Share the full prompt and output on-screen. Transparency builds trust and encourages critique.
- Slow Down for Reflection: Don't rush from prompt to next prompt. Ask, "What are we learning from this output?"
- Document as You Go: Use tools like Notion or Google Docs with AI turned on to co-create a running summary or action plan.

Building the Habit

- The more often a team uses AI together, the more fluid it becomes. It stops being "a weird tool we sometimes try" and becomes "just how we work."
- Think how extreme programming used the idea, that the harder something is, the most often we should do it, and before anyone realised it, good coding practices were everywhere and no one seemed to be really doing XP, they just got better.
- Teams that build shared AI fluency get faster over time, not just in output, but in understanding each other's perspectives, spotting weak ideas, and evolving their collective thinking.

In the next chapter, we'll look at specific case studies, real teams using AI to drive strategy, alignment, culture work, and change.



05

Case Studies & Real-World Scenarios

“

“I think what makes AI different from other technologies is that it’s going to bring humans and machines closer together. AI is sometimes incorrectly framed as machines replacing humans. It’s not about machines replacing humans, but machines augmenting human collaboration.”

— Robin Bordoli

In this chapter, we explore four real-world scenarios that represent the kinds of complex, adaptive challenges strategic leaders face. These aren't theoretical examples, they're the same case problems used in our in-person meetup and AI Collaboration Course. Each one comes from the problems we help to solve in our consultancy, and what our soon-to-be-released Deeper Change AI Bot is designed to help teams solve together.

AI isn't the hero in these stories; collaboration is. But AI plays a powerful supporting role, helping people clarify, align, experiment, and decide.

1. Disjointed Transformation

A company's leadership team has launched a major transformation, but something isn't landing. Tooling is inconsistent, communication feels top-down, and the delivery teams don't feel heard.

Your challenge: Use AI to cut through confusion, analyse mixed messages, and surface the real blockers. Then, synthesise recommendations that help rebuild clarity and coherence across the organisation.

You'll receive: a transformation overview, real bios, meeting notes, and pain points from both leadership and team levels.

This is the first case study we tackle together in the course; learning the tools, hacks, and team collaboration patterns as we go.

2. Designing Learning That Lands

You've been asked to design a high-impact leadership development journey, on a short timeline and with diverse learner needs.

Your challenge: Use AI as your design partner. Work with your team to turn fuzzy strategic goals into a clear learning experience. Co-develop modules, generate inclusive exercises, and iterate based on participant personas.

AI will support the design process, but it's your collaboration and critique that makes the learning meaningful.

3. Resistance Behind the Silence

A department is quiet. Too quiet. Engagement survey results are flat, town halls feel performative, and no one is raising concerns directly.

Your challenge: Work with AI to simulate stakeholder conversations, uncover hidden resistance, and frame coaching questions that surface unspoken dynamics.

Then, use those insights to shape a re-engagement plan that meets people where they are, not where leaders wish they were.

4. Choosing the Right Strategic Future

The board is split. Some want to consolidate, others to expand into adjacent markets, and a bold few argue for disruption.

Your challenge: Use AI to stress-test each scenario. Build comparisons, risk models, and stakeholder narratives. Help leaders move from opinion-based debate to values-based decision-making.

This scenario trains teams to use AI not as a decision-maker, but as a lens to explore implications, clarify values, and guide discussion.

Conclusion: Working with Complexity in Real Time

The scenarios in this chapter aren't puzzles to be solved once, they're doorways into the kind of messy, shifting challenges that leaders face every day. These are complex and adaptive issues, where solving one part often disrupts another. The very nature of systemic change means unintended consequences will arise. This is where collaborative AI becomes invaluable.

Rather than trying to control complexity, teams can use AI to engage with it, rapidly exploring perspectives, simulating interventions, and surfacing implications. Wicked problems may remain sticky, but AI allows us to analyse faster and make sense of live data in context.

As new dynamics emerge, they can be fed back into team-based AI sessions. This creates a learning loop where people aren't waiting on consultants or quarterly reviews, they're adapting in near real time.

Just as agile ways of working helped product teams iterate faster, collaborative AI equips strategists, change agents, and managers to do the same across whole systems. It deepens understanding and speeds up strategic sense-making, helping groups move forward together with more clarity and less drag.

06

Getting Started: Tools, Prompts & Pitfalls

In this chapter, we shift from concepts to action. We'll explore how to run collaborative sessions with AI, from simple group prompts to whole-team workflows. The goal isn't just to use AI, but to build fluency and flow as a group.

The mindset is playful, iterative, and facilitative. You're not just solving a task; you're shaping collective insight.

Setting Up a Collaborative Prompt Session

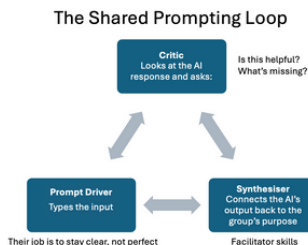
Start by setting the intention of the session. What are you trying to learn, uncover, decide, or design? Then:

- Design the session in advance: Just like a good Liberating Structures workshop, think through the flow. What structures or activities will scaffold the thinking?
- Choose a facilitation format: Fishbowl? Breakout groups? Whole team?

- Assign roles: Prompt Driver, Critic, Synthesiser.
- Use a shared screen: Project GPT so everyone can see and shape the prompt.

Agree on etiquette: Let ideas flow before judging them. Assume the AI will miss the mark, and that's OK.

A reminder:



Prompt Driver: Types the input. Their job is to stay clear, not perfect.

Critic: Looks at the AI response and asks, "Is this helpful? What's missing?"

Synthesiser: Connects the AI's output back to the group's purpose.

Over time, teams can rotate roles to build shared fluency.

Setting Up a Collaborative Prompt Session

You can adapt nearly any workshop format to include prompting:

1. **Design Sprint + GPT:** Use AI to generate “How Might We” questions, scan research insights, or synthesise early prototype feedback.
2. **Retrospectives:** Feed anonymised notes into GPT and ask it to surface patterns, tensions, or unseen dynamics. Let the team critique or validate the results.
3. **Strategy Alignment:** Co-develop prompts like “Summarise our current blockers from the last three meeting notes” or “What are three emerging priorities given our OKRs and feedback data?”
4. **Coaching Circle:** Ask GPT to simulate coaching questions based on someone’s challenge statement. Let the group reflect on which ones resonate most and why.
5. **Breakout Room Learning:** Set up breakout groups, each with an AI-enabled screen. Have each group experiment with prompting based on a common challenge or theme. Groups then reconvene to share what they learned, how they used AI, and what results they got. These collective insights can then be summarised, by humans and AI, and turned into team-wide knowledge.

You can also use breakout rooms to divide a complex problem into parts; technical, cultural, strategic, and emotional, and then assign each sub-group to explore with AI from that angle. When the full group regathers, you can recombine insights into a richer whole-system view.

Getting Started: A Beginner's Stack

To make this real, here's a recommended starting point:

- **AI Tool:** ChatGPT (Pro or Free version), Claude, or Perplexity
- **Collaboration Tool:** Google Docs, Miro, or Notion
- **Prompt Playground:** Shared Zoom, Mural, or Miro board with visible AI screen
- **Cost:** Most tools have free versions to begin experimenting

Also consider:

- **Free vs. Paid:** ChatGPT Pro unlocks newer models but isn't required to start
- Invite colleagues to explore together—not just alone

Beginner Prompt Patterns (Copy + Paste)

- “Based on this meeting transcript, summarise three key risks”
- “What are five stakeholder perspectives on this challenge?”
- “Draft a plan based on these three goals: [insert]”

“Prompt Clinic” – Example of a Vague vs. Strong Prompt

A vague prompt can confuse the AI and your team. A strong prompt brings clarity, focus, and better results. Here's a simple comparison:

Vague Prompt:

“What should we do about this?”

✅ Problem: Too general. The AI won't know what “this” is, and the team won't agree on what the response means.

Strong Prompt:

“Based on this customer feedback [paste summary], what are three service improvements we could explore that align with our Q3 OKRs?”

✅ Why it works:

- Provides context
- Specifies the type of answer desired
- Frames the response in terms of existing priorities

Tip: Great prompts often start with “Based on...”, “Given...”, or “Considering...”. They point the AI, and the team, toward a shared frame of reference.

Advanced Practice: What Experienced AI Users Know

As more organisations experiment with AI in teams, experienced practitioners have learned a few extra lessons:

- **Tool Interoperability Matters**

Embed AI into tools people already use: like Miro, Mural, Notion, Zoom, Slack, or Trello. Adoption increases when friction decreases.

- **Prompting Is Iterative**

Experienced teams work in loops: prompt → response → critique → revise. These micro-loops build shared understanding quickly.

- **Alignment Prompts Are Crucial**

Use prompts to surface emotional temperature, risk tolerance, and alignment. Try: “What’s one unspoken concern the team might have?”

- **Custom GPTs and Embedded Bots Are Powerful**

If you have recurring prompts or documents, consider creating a custom GPT or RAG-based tool trained on org-specific data. (More on this in Chapter 7.)

- **Real-World Testing Is Part of the Loop**

Don’t stop at ideas. Use AI outputs in your work, then gather feedback—what worked? What didn’t? What new prompts does that inspire?

- **Ethics and Safety Matter**

Agree on data sensitivity, group norms, and when not to use AI. Shared prompting is still a form of digital dialogue—treat it with care.

Common Pitfalls

- Treating AI as a guru instead of a partner
- Letting one person dominate the prompt
- Trying to be perfect with the first question
- Not testing outputs in the real world
- Skipping the synthesis step

If you’ve used agile retros, design sprints, or coaching frameworks, you already have the mindset. This chapter is about transferring that mindset into your AI-powered facilitation.

07

Building Your Own AI Assistant (RAG Chatbot)

For many people, ChatGPT is already transformative. It helps them write, plan, and synthesise at speed. But for those working with specific knowledge, repeated patterns, or sensitive challenges, there comes a moment when a general-purpose AI isn't quite enough. You want something grounded in your own work. Something that understands the nuance of your language, your team, your culture. This is where a custom chatbot called a **RAG-based assistant**, starts to shine.

RAG stands for **Retrieval-Augmented Generation**, which is simply a way of combining a large language model like GPT with a curated knowledge base. Instead of relying only on public data, your assistant pulls from your own materials, case studies, documents, transcripts, training decks, notes, and uses that to generate more accurate, more relevant answers.

Imagine a personal librarian that also happens to be a brilliant writer and coach.

This chapter will guide you through what RAG is, how it works, and why it might be the next evolution for teams serious about embedding AI in their work. And as part of the AI course coming shortly, you'll get to try it firsthand.

Malika, who brings deep expertise in product-building for AI, is co-developing a working chatbot built from my own archive with over two decades of articles, frameworks, case studies, and training materials, alongside compatible voices from adjacent fields. This isn't just a demo; it's a functioning knowledge partner you'll get to experiment with during the course.

When and Why to Build Your Own

Not every team needs a bot. But if you're repeating the same knowledge across roles, managing systemic change, or trying to align multiple stakeholders around shared language, then a private assistant can unlock huge value. Think of it like this: ChatGPT helps individuals get smarter faster. A RAG bot helps a team get aligned faster.

It's especially useful when your work is sensitive, specific, or full of nuance. If you're in a transformation programme and need to surface patterns from interviews, documents, or feedback loops, it can do that. If you want consistency across teams in how language and practices are applied, it can help there too. Most importantly, it allows you to stop reinventing the wheel every time a new team member joins or a new strategy phase begins.

What It Actually Does

Here's what's happening under the hood: when someone types a question, the assistant doesn't just respond from memory. Instead, it turns the question into a mathematical fingerprint (called a vector), then scans all of your uploaded materials to find the most relevant chunks of text. Those chunks are passed to GPT, which then crafts a response using only what it's been given.

So instead of "hallucinating" or guessing, your AI is working more like a research assistant; it retrieves and synthesises, not imagines.

Building One Yourself

While the concept sounds technical, the process is increasingly accessible, especially with the new no-code tools now available. You begin by gathering your materials: articles, decks, manuals, case notes, meeting transcripts, whatever you want the AI to "know."

You don't need to include everything, but you do want quality: writing that reflects your values and language.

Once you've got that archive, the content is broken into smaller chunks, typically paragraphs or sections. This step is vital, because AI doesn't absorb long documents all at once. It needs concise, retrievable slices.

Those chunks are then converted into embeddings, think of them as coordinates in a vast conceptual map. You store these in a special kind of database (a vector database), which the AI can query based on meaning, not keywords.

Finally, you connect this system to a friendly interface: this is what your team will actually see and interact with, and plug in a language model like GPT-4. And just like that, you've got your own custom AI assistant.

Built for Change

In large-scale programmes, knowledge is often scattered across decks, notes, people's heads. A good RAG assistant doesn't just answer questions. It becomes a system-wide feedback tool, surfacing patterns, tensions, and themes that might otherwise go unnoticed. It can help prep stakeholder briefings. It can analyse trends in team sentiment. It can even help you spot where change is stalling, before it becomes visible on the surface.

That's why Malika and I are building one from the ground up, designed specifically for change makers, transformation leaders, and collaborative teams.

It won't replace coaching. It won't replace facilitation. But it will amplify insight, speed up reflection, and keep complex adaptive problems from becoming stuck.

Things to Keep in Mind

Like any tool, a RAG assistant requires stewardship. If you feed it junk, it returns junk. If you update it regularly, it becomes a living record. If you create space for feedback, it evolves. You'll want to be mindful about what goes in (especially confidential material), and intentional about how teams use it (especially in sensitive settings).

In that sense, building a bot is also a leadership practice. It reflects how you curate knowledge, how you support learning, and how you design your systems for continuous insight.

It's the difference between asking a smart colleague for advice and having an expert team handbook that grows with you.

Why It's Different From Just Using ChatGPT

Many people ask: can't I just paste my work into ChatGPT? The answer is yes, for small tasks. But a RAG chatbot goes much further. It remembers your materials persistently. It can be refined and updated over time. It allows multiple team members to ask questions and share learnings. And it's far more scalable, especially if your knowledge is extensive or constantly evolving.

Comparison Table — ChatGPT vs. RAG Assistant

Feature	ChatGPT	RAG Assistant (Custom Bot)
Data Source	Trained on public internet data	Pulls from your own documents and
Memory	No memory between sessions (unless	Persistent context based on your
Accuracy for Specific Content	May guess or hallucinate	Grounded in your real materials, fewer
Customisability	Limited to generic prompt tweaks	Fully customisable with your tone, tools,
Team Collaboration	Individual use unless screen-shared	Multi-user support for shared knowledge
Best Use Case	Broad questions, writing, brainstorming	Domain-specific insights, training,
Setup Required	None	Requires setup (we show you how in the

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How to Join the AI Collaboration Course

Why This Course Now?

Across industries, leaders and change agents are waking up to a new divide: not between those who can code and those who can't, but between those who know how to collaborate with AI and those who don't. The tools are available, but the mindset, skills, and practical experience are still rare.

We created this course to help close that gap, bringing AI out of the hands of isolated experts and into the flow of team-based learning, decision-making, and innovation.

It's not just about skills. It's about practice, confidence, and fluency.

What the Course Includes

This is a live cohort experience, high-touch, highly participatory, and designed around real-world work. You'll get:

- Facilitated sessions showing how to integrate AI into collaborative practices.
- Hands-on group experiments with prompting, critique, and synthesis.
- Custom templates and prompting libraries for use in your own work.
- A RAG assistant trained on our content and that of aligned experts, ready for you to explore.
- Breakout rooms, live coaching, and team design labs to test what works.
- Follow-up support and community after the cohort ends.

Whether you're a change-maker, manager, coach, facilitator, or L&D professional, you'll leave with confidence to bring AI into your team work; ethically, creatively, and effectively.

Who It's For

This course is designed for:

- People who work with teams to solve complex problems.
- Those who want to make sense of AI, fast, without becoming a developer.
- Organisations seeking to integrate AI into culture, not just tools.
- Individuals preparing to lead responsibly in an AI-enabled future.

You don't need to be “techy.” You need to be curious, collaborative, and willing to learn by doing.

Outcomes

By the end of the course, you'll be able to:

- **Design and lead collaborative AI sessions using proven frameworks.**
- **Use AI to improve strategy, facilitation, coaching, and learning design.**
- **Avoid common mistakes in team-based AI use.**
- **Join a growing network of ethical, innovative AI collaborators.**

What's Next?



If you're ready to bring AI into your work in a human-centred, practical, and collaborative way — we'd love to have you.

[REGISTER NOW](#)

This isn't just a course. It's a movement, toward better thinking, better teaming, and a more intelligent way to solve complex problems together.



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