

Leading the AI Conversation

A prep checklist for the meeting you have been putting off.

Your team already has an opinion about where you stand on AI, even if you have never said a word. This checklist is the version of that conversation you have on purpose.

BEFORE YOU WALK IN

Seven Step Preparation

1 Settle your own position.

Decide what you actually think about AI. Not the answer you want to give the team. Your real view.

SAY IT OUT LOUD BEFORE THE MEETING:

- "AI is real, it is moving faster than I expected, and we are going to engage with it on purpose."
- "I am still figuring this out. That is the truth, and we are figuring it out together."

2 Pick the one sanctioned tool.

One business tier tool. Not the free version. Know the access path before the meeting.

HOW TO PICK ONE:

- **Business tier, not free.** Free public versions may train on your data. Business tier keeps your content private.
- **Match your team's platforms already used.** Microsoft 365, Google Workspace, your CRM, whatever they already live in every day.
- **Do not wait for the perfect tool.** Something better will come out next month. Pick a solid one now and move.

3 Pick the first pilot.

Use the filter: does this save time on something you already do every day or every week? Name the workflow, the owner, and the follow-up date.

PILOTS THAT ALMOST ALWAYS WORK:

- **Supervisor or team lead.** AI meeting notes for your weekly standup. Use Otter, Fireflies, or your tool's built in version.
- **Practice owner or department head.** AI drafted customer or patient follow-up messages, reviewed by a human before sending.
- **Director or CEO.** AI synthesis of weekly reports into a one page leadership summary.

4

Write your opening sentence.

The first sentence matters more than any other in the hour. Pick one pattern and write it down.

PICK ONE THAT SOUNDS LIKE YOU:

Direct. "I have been thinking about AI and quiet for too long. That ends today."

Honest. "I do not have all the answers on AI. The worst thing I can do is wait until I do."

Personal. "I have been using AI on my own work. Here is what I have learned."

5

Prepare for the three fears.

Your team is carrying these into the room whether they say so or not. Have one line ready for each.

USE THESE ANSWERS (ADAPT TO YOUR SITUATION):

- **"Will I lose my job?"** "I am going to use AI to make our work better, not to make us smaller."
- **"Will I get in trouble for using it wrong?"** "I would rather you use a sanctioned tool openly than an unsanctioned one quietly."
- **"Are you going to drop this in two months?"** "We come back together on [date] to look at the result. You will not have to guess where I stand."

6

Write your three commitments.

Say these out loud at the end of the meeting. Fill in the blanks before you walk in.

FILL IN THE BLANKS:

- "This week, I will personally try ___ on my own work."
- "Our pilot is ___, owned by ___, with a check in on ___."
- "We come back together as a team on ___ to talk about this again."

7

Send the meeting invite.

Sixty (or less) minutes. Send it at least two days out so people have time to think.

USE THIS INVITE:

Subject line: Where we stand on AI: quick team meeting [day, date]

Body:

Team,

I want to talk with all of you about AI. Where I stand, what we are going to try, and what I expect from you. Sixty minutes. Bring your honest questions. No prep needed.

[Your signature]

KEEP IN FRONT OF YOU

During the Meeting

The Three Data Buckets

GREEN • SAFE

Any approved tool.

Marketing copy, press releases, anything already on your website.

YELLOW • SANCTIONED ONLY

Sanctioned tool only.

Internal docs, process notes, meeting summaries with names removed.

RED • STOP

Stop. Ask first.

Customer info, patient info, financial info, trade secrets, contracts.

THE ONE FILTER

Does this save us time on something we already do every day or every week? If yes, try it for two weeks and measure. If no, set it aside, no matter how interesting it sounds.

THE THREE NONNEGOTIABLE CONVERSATIONS

Your team. Your customers. Your board or leadership. If you have not had all three, you do not have an AI strategy. You have an AI hope.

SILENCE IS A POSITION

***Lead AI on purpose,
or it will lead you by accident.***