

An Easy Framework to Introduce AI into Your CS Program

CxXchange SuccessHour Breakout Notes

December 10, 2024

Lightning Round Introductions!

- Name
- Current/ Most Recent Role & Company
- Status: Job Seeker, First 6 months, 6+ months

1. Question prompt:

Are you using AI in your customer success workflows today? If so, how?

2. Question prompt:

Do any workflows (or ideas) match all four qualifications criteria (data, repetition, manual effort, strategic objective)?

- A. How would you apply these principles to things in your life you want to streamline? (Have you?)

Group 1

Names:

Notes:

Group 2

Names:

- Alyssa Rudner- <https://www.linkedin.com/in/alyssarudner/>
- Pam Micznik: <https://www.linkedin.com/in/pmicznik/>
- Priscila Fletcher - CS Coaching - Latinos in CS

Notes

- AI in workflows -
 - Organize her day - meeting to meeting
 - Meeting transcripts - keep leadership team
 - Presentations
 - Fathom.video
 - Gamma.ap - helps you build presentations - craft story in ChatGPT - and Gamma
 - Landing pages for websites
 - Videos for the community - Riverside
 - Canva
 - Update.ai
 - Use LinkedIn profiles to determine personality profile and how to communicate with them.
 - Customers coming to you to:
 - Make money
 - Save money
 - Solve a problem

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Group 3

Names:

- Parth
- Charlie Baliman
- Debbie
- Fran Rubenstein

Question prompt:

Are you using AI in your customer success workflows today? If so, how?

- Parth: Yes, use airtable and AI, meeting prep, interaction analysis after notes and more!!!
- Debbie - not allowed to use any AI tools, blocked on corp computers
- Charlie - encouraged to use AI, Gong, SFDC. Tasks and workflows.
- Fran - Just using chat gpt right now for applications

Do any workflows (or ideas) match all four qualifications criteria (data, repetition, manual effort, strategic objective)?

- B. How would you apply these principles to things in your life you want to streamline? (Have you?)

Notes:

Group 4

Names:

Notes:

Group 5

Names

Notes

Group 6

Names:

Notes:

Claude, Module for AI

Can create your own GPTs across the team

Group 7

Names: Lynn Pietryga, Keishla Ceaser-Jones, Rebecca Zent, Johnatan Sanchez

Notes:

- Using AI for general tasks (emails), would love for ways to automate manual work and identifying trends to allow more time to be consultative. ChatGPT for company summaries and financials.

- Important to have people who know how to ask questions/refine prompts to get what they need out of AI - “how to train your dragon”
- Need to embrace it - AI will be a part of most tools, how do you remove the fear to free your team up to do the most important things; need to show value and impact
- Call recording tools (Gong, Zoom) that can summarize calls and save it

Group 8

Names:

Notes:

Group 9

Names

Notes

Group 10

Names

Notes

Group 11

Names

Notes

Group 12

Names

Notes

Group 13

Names

Notes

Group 14

Names

Notes

Group 15

Names

Notes