

How to Use AI to Analyze Discovery360 Results

A practical guide for turning survey responses and interview notes into clear themes and actionable recommendations

What's in it for you:

- You've collected tons of Discovery360 feedback and need help finding the patterns
 - You want to move from raw data to clear themes without drowning in spreadsheets
 - You need to create a compelling report that shows both strengths and opportunities
 - You want to use AI to speed up analysis while keeping the human insights intact
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Why This Works

Remember what David said about AI and market segmentation: **"60% of the work probably can be done there. You can test a lot of hunches."** The same is true for analyzing Discovery360 results. AI can quickly identify themes, sentiments, and patterns across hundreds of responses, but you provide the context and make the final decisions about what matters most.

The key: AI helps you see patterns faster, but you still need to read through the actual responses yourself. Think of AI as your research assistant that helps you organize and spot themes, while you provide the human judgment about what really matters and what might be missing.

This isn't about replacing your judgment—it's about getting unstuck when you're staring at 200 survey responses and combining AI efficiency with your own careful reading.

Before You Begin: Organize Your Data

What You'll Need:

- **Survey responses** (exported from your survey platform)
- **Interview transcripts or detailed notes** (even rough notes work!)
- **Your original Discovery360 questions** for reference
- **Basic context** about your organization and current challenges
- **Access to Claude or ChatGPT** with file upload capability

Quick Data Prep (10 minutes):

1. **Export survey data** as CSV or copy into a Google Doc
 2. **Compile interview notes** into one document (don't worry about perfect formatting)
 3. **Note your response numbers** (e.g., "34 staff, 27 stakeholders, 16 interviews")
 4. **Have your context ready** (org size, current challenges, why you did the Discovery360)
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The Step-by-Step Process

Step 1: Set Up Your AI Assistant

For Claude Projects:

1. Create a new Project called "Discovery360 Analysis"
2. Add this system prompt: *"You're helping me analyze Discovery360 results using Helia's approach. This assessment tool gathers feedback from across an organization to identify strengths and opportunities. Help me find clear themes in the data, starting with strengths, then highlighting key challenges and opportunities. Focus on patterns that appear repeatedly across different respondent groups. Keep the analysis grounded in what people actually said, not generic organizational advice."*
3. Upload your survey data and interview notes to the project knowledge



For ChatGPT: Start with this context-setting prompt:

"I need help analyzing results from our Discovery360 organizational assessment. This tool surveys staff and stakeholders to understand what's working well and what needs attention. I'll share our data and want you to help me identify the key themes, starting with strengths and then highlighting areas for growth. Focus on patterns that show up repeatedly and specific examples people shared."

Step 2: Read Through Your Data First

Before diving into AI analysis, spend 30-60 minutes skimming your responses. You don't need to analyze everything deeply, but you want to:

- **Get a feel for the tone and energy** across responses
- **Notice any responses that stand out** as particularly insightful or concerning
- **Spot obvious patterns** (like the same issue mentioned repeatedly)
- **Identify surprising or unexpected themes** that catch your attention
- **Note any responses that feel different** from the majority

Jot down 3-4 initial impressions as you read. These will help you check whether AI is catching the same things you're seeing or missing something important.

Step 3: Get the Big Picture Overview

Use this starter prompt:

None

Here's our Discovery360 data from [organization description]:

- [X] staff responses
- [Y] stakeholder/community responses
- [Z] interviews

[Paste or upload your data]

Please provide a high-level overview:

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1. What are the top 3-5 organizational strengths that emerge repeatedly?
2. What are the main challenges or opportunities people identified?
3. Are there any surprising patterns or contradictions in the responses?
4. How do staff perspectives compare to stakeholder/community perspectives?

Keep this grounded in what people actually said, with specific quotes or examples where possible.

After AI gives you this overview, check it against your initial impressions:

- Did AI catch the themes you noticed while reading?
- Are there patterns you saw that AI missed or downplayed?
- Does the tone AI describes match what you felt reading the responses?
- Are there specific responses that stood out to you that should be highlighted?

Step 4: Deep Dive on Strengths

Following the Discovery360 approach of starting with strengths:

None

Let's go deeper on the strengths. Based on the responses:

1. What specific words, phrases, or examples do people use when describing what's working well?
2. Which strengths appear across different stakeholder groups (staff, community, funders, etc.)?
3. What stories or examples did people share about when the organization is at its best?

4. Are there strengths that staff see that external stakeholders might not fully appreciate, or vice versa?

Organize this into 3-4 clear strength categories with supporting evidence from the responses.

Cross-check with your reading: As you review AI's strength analysis, think about:

- Are there positive responses you remember that AI didn't include?
- Do these categories feel right based on what you read?
- Are there nuances or context that AI might have missed?

Step 5: Identify Key Challenges and Opportunities

None

Now let's look at the challenges and opportunities:

1. What issues or concerns come up repeatedly across different respondent groups?
2. What specific examples or stories did people share about what's not working?
3. Are there themes that only certain groups mentioned? Why might that be?
4. Which challenges seem most urgent vs. which are longer-term opportunities?
5. Where do you see the biggest gaps between what people want and what currently exists?

Group these into themes and note which stakeholder groups mentioned each one.

Reality-check the challenges: Before moving on, ask yourself:

- Did AI capture the most concerning responses you remember?

- Are there subtle issues you noticed that might not have shown up clearly in AI's analysis?
- Do the urgency levels AI suggested match your sense from reading?

Step 6: Look for Surprises and Contradictions

None

Help me understand what might be surprising or contradictory:

1. Are there areas where staff and external stakeholders see things very differently?
2. What positive themes emerged that leadership might not have expected?
3. Are there challenges that only certain groups identified? What might explain this?
4. Where do you see potential blind spots—things that aren't being talked about but might be important?
5. Are there any responses that seem to contradict the overall themes?

Trust your gut here: If something felt surprising or important when you were reading but AI didn't pick up on it, bring it up:

- *"I noticed [specific example] when reading through responses. Why might this be significant even if it only came up a few times?"*
- *"There was a tone in several responses that felt [frustrated/excited/worried]. Can you look for that pattern?"*

Step 7: Generate Actionable Insights

None

Based on all the data, help me identify actionable opportunities:

1. What are 2-3 immediate wins the organization could focus on in the next 3-6 months?

2. What longer-term strategic opportunities emerged from this feedback?
3. Which challenges require leadership attention vs. which could be addressed at the team level?
4. Where do you see the biggest potential for building on existing strengths?
5. What recommendations would you make based on the patterns you're seeing?

Frame these as specific, concrete next steps rather than general advice.

Final sense-check: Before finalizing recommendations:

- Do these feel realistic based on what you know about your organization?
- Are there practical constraints or context AI might not understand?
- Would the people who responded recognize their input in these recommendations?

Sample Prompts for Common Situations

When you have tons of open-ended responses:

None

I have [number] open-ended responses to the question "[your question]". Can you categorize these responses into 4-6 main themes, showing how many responses fit each theme and providing 2-3 representative quotes for each category?

When responses feel scattered:

None

These responses feel all over the place. Help me find the underlying patterns—what are people really saying beneath the surface? Are there common concerns expressed in different ways?

When you need to compare different groups:

None

Compare how [staff] responses differ from [stakeholder] responses on [specific topic]. What might explain these differences? What does each group see that the other might be missing?

When you need specific examples:

None

I need concrete examples for my report. From the responses about [theme], what are the most compelling stories or specific examples people shared? I want to illustrate this theme with real voices from our community.

When AI analysis feels off:

None

I read through the responses myself and my sense is that [describe what you noticed]. Your analysis focuses on [what AI emphasized], but I'm seeing [what you saw differently]. Can you look at this from a different angle and help me understand if there's a pattern I should pay attention to?

None

Help me structure these findings into a clear report section. I want to start with strengths, then address challenges, and end with opportunities. Use the actual language from responses where possible, and organize it in a way that leadership can easily understand and act on.

Pro Tips for Better Analysis

Combine AI Speed with Human Insight

- **Always read through responses yourself first** - even a quick skim gives you important context
- **Use your initial impressions to check AI's work** - if something feels off, dig deeper
- **Pay attention to tone and emotion** in responses, not just content themes
- **Trust responses that stuck with you** during your reading - they often represent important insights

Keep It Grounded

- Always ask AI to quote specific responses rather than summarizing generically
- Look for patterns in actual language people use, not just themes
- Pay attention to what people DON'T mention as much as what they do

Use Multiple Prompts

- Don't try to get everything in one analysis
- Break it down: strengths first, then challenges, then opportunities
- Come back with follow-up questions when something feels unclear

Cross-Check Different Groups

- Analyze staff responses separately from stakeholder responses

- Look for differences between long-term and newer team members
- Compare leadership perspectives to front-line staff perspectives

Focus on Action

- Push AI to get specific about recommendations
 - Ask "what would this look like in practice?" for vague insights
 - Connect findings back to decisions the organization needs to make
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Creating Your Report and Presentation

Once you have your analysis, use AI to help structure your final deliverables. The key is starting with the format your audience prefers and building from there.

Step 1: Choose Your Format

For detailed reports (Word doc style):

None

Based on our analysis, help me create a comprehensive Discovery360 report following this structure:

1. **Executive Summary** (2-3 paragraphs highlighting key findings)
2. **Assessment Overview** (methodology, response rates, stakeholder groups)
3. **Key Organizational Strengths** (3-4 main strengths with supporting evidence)
4. **Areas for Growth** (3-4 key challenges/opportunities)
5. **Stakeholder Insights** (what different groups told us)
6. **Recommendations** (specific next steps organized by timeframe: immediate, 6-months, 12-months)
7. **Conclusion** (next steps in the strategic planning process)

Use actual quotes and examples from our data throughout. Make it compelling but honest—celebrate strengths while being clear about areas that need attention. Target length: 8-12 pages.

For presentation format:

None

Help me create a Discovery360 presentation outline with 12-15 slides:

Slide 1: Title & Overview

Slides 2-3: Process & Participation (who we heard from)

Slides 4-7: Key Strengths (with supporting quotes)

Slides 8-11: Growth Opportunities (with specific examples)

Slide 12-13: Recommendations & Next Steps

Slide 14-15: Questions & Discussion

For each slide, provide:

- Clear headline that summarizes the main point
- 2-3 bullet points with supporting data/quotes
- Suggested visual elements (charts, quotes, graphics)

Keep text minimal and focus on the most compelling insights from our data.

Step 2: Upload Your Templates (If You Have Them)

If you already have Discovery360 report templates or presentation formats:

For Word templates:

None

I'm attaching our standard Discovery360 report template. Please help me populate it with our analysis findings, maintaining the structure and tone but customizing the content based on our specific data. Keep the sections that work and suggest modifications where our findings don't fit the standard template.

For PPT templates:

None

Here's our Discovery360 presentation template. Help me adapt the content for our specific findings:

- Maintain the visual style and slide flow
- Replace placeholder content with our actual themes and quotes
- Suggest where we might need additional slides or different organization based on our unique findings
- Recommend which quotes or examples would work best visually

Step 3: Create Multiple Formats from One Analysis

Start with the detailed report, then create shorter versions:

None

I have this comprehensive Discovery360 report. Help me create three additional versions:

1. **Executive brief** (2-page summary for senior leadership)
2. **Board presentation** (8-10 slides focusing on strategic implications)
3. **Team share-out** (accessible format for all-staff meeting)

Each should highlight the same key findings but be tailored for the audience's needs and time constraints.

Step 4: Make It Visual (Gamma Integration)

After creating your written content:

None

I want to turn this Discovery360 report into a presentation using Gamma. Help me:

1. Identify the 10-12 most important points that should become slides
2. Write clear, compelling headlines for each slide
3. Suggest what type of visual would work best (quote highlight, simple chart, icon + text, etc.)
4. Provide concise bullet points that will work well visually
5. Recommend a logical flow that tells the story of our findings

Format this as a detailed outline I can easily input into Gamma or similar AI presentation tools.

Pro tip for Gamma: You can then paste AI's outline directly into Gamma with prompts like:

- "Create a professional presentation about organizational assessment findings"
- "Use a clean, modern design with blue and white color scheme"
- "Include space for quotes and data visualization"

Step 5: Customize for Different Audiences

For your board:

None

Adapt our Discovery360 findings for a board presentation. Focus on:

- Strategic implications of what we learned
- Financial or operational themes that need board attention
- Opportunities that align with our mission and strategic goals
- Specific areas where board support or input would be valuable
- How these findings inform our strategic planning process

Keep it high-level but include enough detail that board members feel informed and can provide meaningful input.

For your team:

None

Create a team-friendly version of our Discovery360 findings that:

- Celebrates specific strengths people mentioned
- Addresses challenges honestly but constructively
- Shows how individual feedback contributed to the overall picture
- Connects findings to day-to-day work and team priorities
- Invites continued dialogue and input on next steps

Make it feel like a conversation, not a formal report.

For external stakeholders:

None

Create a stakeholder-friendly summary that:

- Thanks participants for their input
- Highlights key themes without internal organizational details
- Shows how their feedback is being used in strategic planning

- Demonstrates organizational commitment to listening and improving
- Invites continued engagement in appropriate ways

Keep it transparent but professional.

Other Helpful AI Applications

Create Supporting Materials

None

Based on our Discovery360 findings, help me create:

- An FAQ document addressing common questions that came up
- A timeline showing how we'll address key recommendations
- Talking points for leadership when discussing findings with different groups
- Email templates for sharing results with various stakeholder groups

Plan Your Rollout

None

Help me create a communication plan for sharing these Discovery360 results:

- Who needs to see the full report vs. summary versions?
- What's the best sequence for sharing with different groups?
- How should we frame the findings for each audience?
- What questions should we be prepared to answer?
- How do we keep momentum going after sharing results?

Prepare for Questions

None

Based on our findings, what questions should leadership be prepared to answer when we share these results? Help me develop thoughtful responses to likely questions, especially around:

- Timeline for addressing challenges
- Resource needs for recommendations
- How decisions will be made about priorities
- Ways for continued input and engagement

Sample Analysis Outputs

What good AI analysis looks like:

- ✓ **Grounded in data:** "75% of staff mentioned communication challenges, with specific examples like 'information silos between departments' and 'decisions made without input.'"
- ✓ **Preserves authentic voice:** "One stakeholder noted: 'They don't just serve families, they become part of the community'—this sentiment appeared across multiple responses."
- ✓ **Shows patterns:** "Both new and veteran staff identified professional development as a need, but for different reasons..."

What to avoid:

- ✗ **Generic insights:** "Communication needs improvement" (too vague)
- ✗ **Losing the human element:** "Stakeholders reported satisfaction metrics of 4.2/5" (missing the why)
- ✗ **Over-interpretation:** Making big claims from small mentions

Questions to Ask Yourself



During analysis:

- Does this match what I expected, or are there surprises?
- Are we hearing from all the voices we intended to reach?
- What themes require immediate attention vs. longer-term planning?
- **Does AI's analysis match my impressions from reading the responses myself?**

Before finalizing:

- Would someone who wasn't part of this process understand our findings?
- Have we balanced strengths with growth areas appropriately?
- Are our recommendations specific enough that someone could act on them?

After sharing:

- How are different stakeholders responding to the findings?
- What additional questions are coming up that we should explore?
- How will we use these insights in our ongoing work?

Remember the Discovery360 Philosophy

The goal isn't perfect analysis—it's useful insights that lead to action. AI helps you find patterns quickly and organize large amounts of data, but your reading and judgment determine what matters most for your organization. The combination of AI efficiency and human insight gives you both speed and depth.

Start with strengths, be honest about challenges, and focus on concrete next steps that will make a real difference.

Most importantly: The people who responded to your Discovery360 want to see that their input mattered. Use AI to help you organize and present their insights, but make sure their authentic voices come through in your final report.



Based on Helia's Discovery360 methodology and the practical wisdom that listening to your community is always the right starting point. As always, take what's helpful, leave what's not, and make it your own.

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