HOW I USED AI TO PREPARE FOR A PARTNER MEETING

By Rick Piña

Watch the video: **https://youtu.be/4o1Hnw_Bae8** (4 minutes)
Full guide: **https://guides.rickpina.cloud/ai-partner-meeting-prep/**

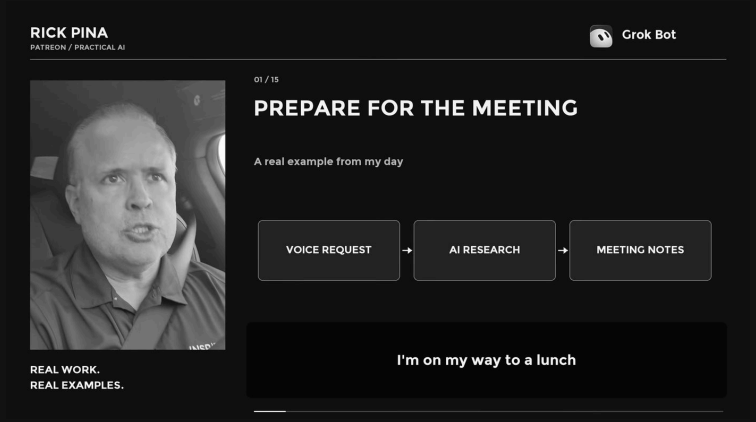


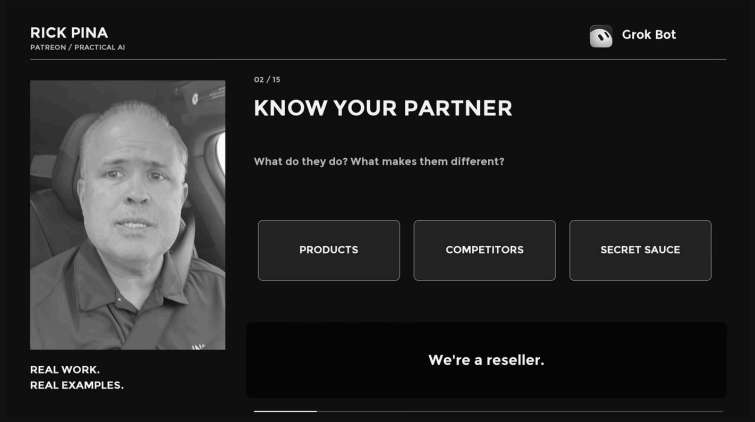
WHY I AM SHARING THIS

People ask me how I actually use AI. This is how.

I was driving to lunch with a partner and realized I didn't have time to prepare. So I prepared in the car, by voice, hands-free.

Six minutes out, I had research, questions to ask, three talking points, and one ask. My AI assistant built it as a Google Doc in my Google Drive and emailed it to me. I did not type it. Coming out of that lunch, the notes worked perfectly.





PLAIN ENGLISH

TERMS IN PLAIN ENGLISH

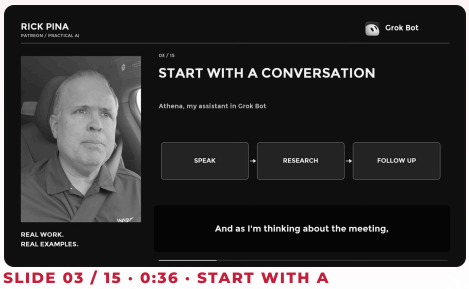
- **Grok Bot:** the AI assistant app I use on my phone, in voice mode (I talk, it talks back).
- **Athena:** my personal assistant inside Grok Bot.
- **IT value-added reseller:** a company that sells technology from manufacturers and partners and adds its own services. That is Inspired Solutions.
- **Secret sauce:** the one thing that makes a company different from others selling something similar.
- **Public cloud:** computing rented from a big provider, on equipment shared by many customers.
- **Private cloud:** computing set up for one organization. Off-premise means it lives in someone else's data center, not your building.
- **Hyperscaler:** one of the giant public cloud companies (Amazon Web Services, Microsoft Azure, Google Cloud).
- **Data residency:** the rules about where a customer's data is allowed to physically live.
- **CONUS:** the continental United States, the lower 48.
- **Consulting lens:** My consulting lens, which looks at a problem the way Booz Allen Hamilton, McKinsey, Deloitte, Accenture, and BCG would (not affiliated with those firms).
- **Google Doc:** a free online document from Google you can open on your phone.
- **Google Drive:** the online space that comes with a Google account, where your Docs are saved.
- **VITA:** the Virginia Information Technologies Agency, the state's IT agency.

HOW I USED AI TO PREPARE FOR A PARTNER MEETING
PRACTICAL AI NOTES

STEP BY STEP

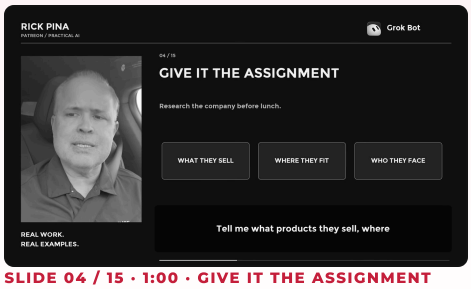
THE NINE STEPS

(every prompt was spoken, as close as I can give it to you)



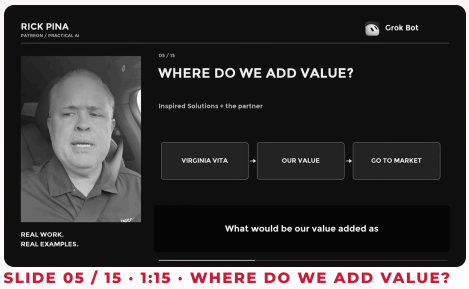
SLIDE 03 / 15 · 0:36 · START WITH A CONVERSATION

1. Start with a conversation (0:40). I opened Grok Bot in voice mode and talked to Athena like a person riding with me. I had no desk. I had a drive.



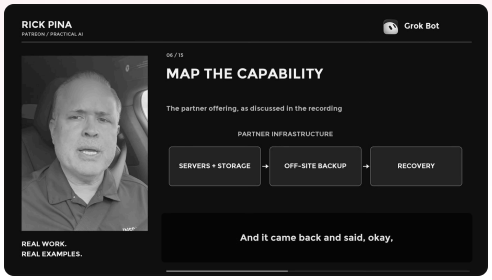
SLIDE 04 / 15 · 1:00 · GIVE IT THE ASSIGNMENT

2. Give it the assignment (0:51). What I said was roughly: "Hey, listen, I'm going to have lunch with this company. I kind of think I know what they do, but do research on them. Tell me what products they sell, where do they sit in the IT market, who their competitors are, what is their secret sauce." Four questions give you the whole picture.



SLIDE 05 / 15 · 1:15 · WHERE DO WE ADD VALUE?

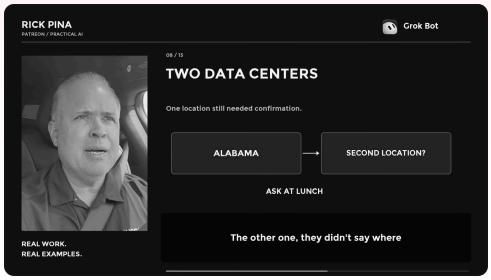
3. Tell it where you fit (1:04). The partner already added us to their Virginia VITA contract, which is the Virginia IT contract. Then, roughly: "What would be our value added as Inspired Solutions? How would or could we, should we go to market together? What are some talking points?" This is the question the lunch is really about.



SLIDE 06 / 15 · 1:27 · MAP THE CAPABILITY

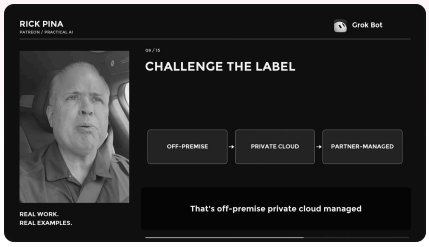


SLIDE 07 / 15 · 1:48 · ASK THE NEXT QUESTION



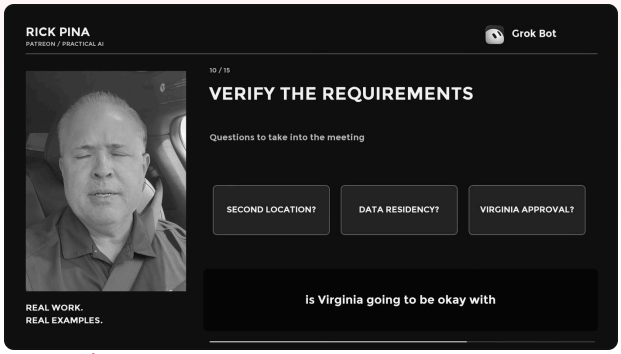
SLIDE 08 / 15 · 1:58 · TWO DATA CENTERS

4. Ask the next question (1:24). It came back with what they do and their secret sauce, and it kept saying public cloud. I asked: "Well, which public cloud do they use? Which hyperscaler?" It researched again. They don't use a hyperscaler. They run their own data centers instead, two of them. It found one in Alabama. Where the other one is became a question for lunch.



SLIDE 09 / 15 · 2:06 · CHALLENGE THE LABEL

5. Challenge the label (2:02). I corrected it: if they run their own data centers, that's not public cloud, that's private cloud. It agreed, roughly: "You're right. You're right." The AI was confident and the label was wrong. The AI does the legwork. You bring the judgment.



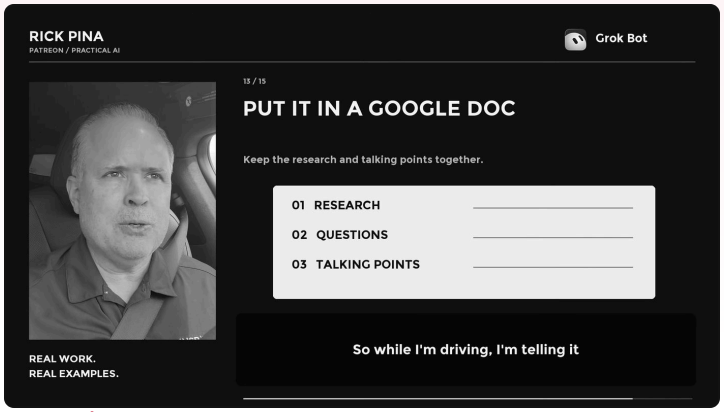
SLIDE 10 / 15 · 2:27 · VERIFY THE REQUIREMENTS

6. Verify the requirements (2:20). It gave me questions for lunch: where is the second data center, and is Virginia okay with having its data in Alabama or wherever the other one is. It said most states are fine as long as the data is in CONUS, but verify that. A rule of thumb is not the answer. The contract is.



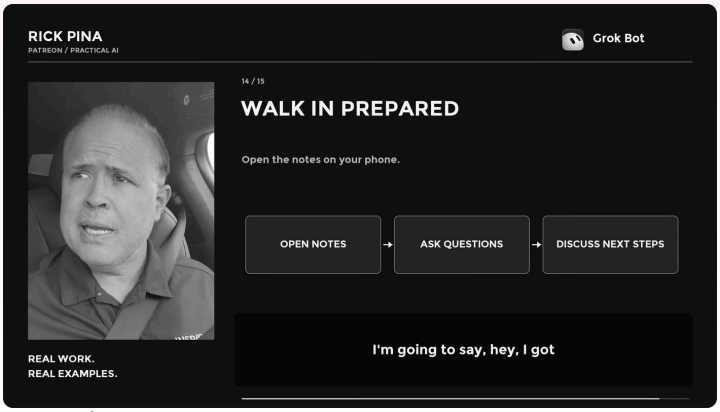
SLIDE 11 / 15 · 2:54 · USE THE CONSULTING LENS

7. Run it through the consulting lens (2:45). Roughly: "Whoa, wait a minute, run this through the consulting lens." It is my consulting lens, which looks at a problem the way Booz Allen Hamilton, McKinsey, Deloitte, Accenture, and BCG would (not affiliated with those firms). Whenever I have something, I just say, run it through the consulting lens. What came back: out of all these things, these are the three things you need to talk about at lunch, and ask for this at the end. From information to priorities.



SLIDE 13 / 15 · 3:21 · PUT IT IN A GOOGLE DOC

8. Put it in a Google Doc (3:15). "Put that in a Google Doc." Going back and forth while I drove, my AI assistant built the brief as a Google Doc in my Google Drive and emailed it to me: research, questions, talking points. I did not type it.



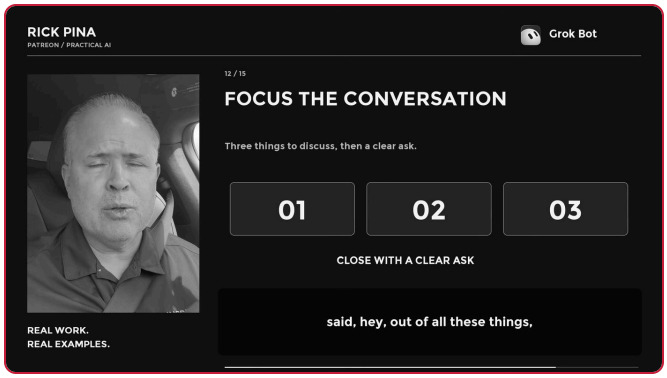
SLIDE 14 / 15 · 3:33 · WALK IN PREPARED

9. Walk in prepared (3:25). Six minutes out. At the table: "Hey, I got some notes. Is it okay if I go through these notes while we eat?" Asking permission is respect, and it shows you did your homework.

The AI needed me twice: to ask the next question and to fix the label. Then it needed counsel to turn information into a plan.

Proverbs 15:22 (AMPC): "Where there is no counsel, purposes are frustrated, but with many counselors they are accomplished."

Not one voice. Many counselors. Then one clear plan for the table.



COPY-PASTE PROMPTS (FILL IN THE BRACKETS)

1. "I'm meeting with [company or person] on [day]. I think they [what you believe they do], but research them. Tell me what [products or services] they sell, where they sit in the [industry] market, who their competitors are, and what their secret sauce is."
2. "We are a [what your company or ministry does]. [One sentence on the relationship]. What would be our value added? How could we go to market together? What are some talking points?"
3. "You keep saying [term]. Which [specific one] exactly? Go back and check, and tell me where you found it."
4. "I don't think that's [label it used]. From what you found, it sounds like [your read]. Check that and tell me if I'm right."
5. "What should I ask in the meeting to confirm what you could not find? What rules or requirements should I verify for [customer, contract, or location]?"
6. With a lens: "Run this through the consulting lens. Out of all of this, give me the three things I need to talk about at [meeting] and the one thing to ask for at the end." No lens set up: "Look at these notes the way a top consulting firm would. Give me the three things that matter most for [meeting] and the one clear ask to close with."
7. "Put that in a Google Doc in my Google Drive called [meeting name and date], with three sections: research, questions to ask, and talking points with the ask at the end. Then email it to me."
8. At the table: "Hey, I've got some notes. Is it okay if I go through these while we eat?"

SET IT UP YOURSELF

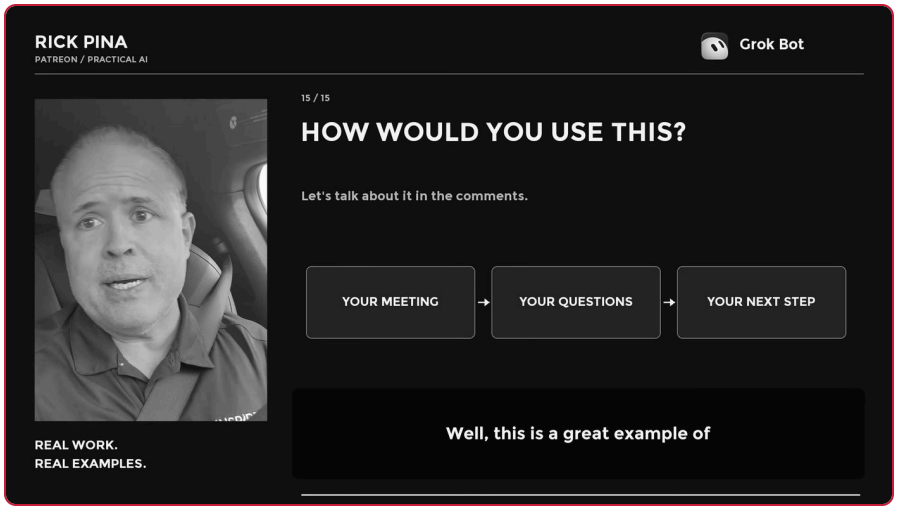
1. Pick an AI assistant app with voice mode and web search. I use Grok Bot.
2. Tell it once who you are, what you do, and who you serve.
3. Add a review pass before the meeting. I say "run it through the consulting lens." No lens needed: prompt 6 has a day-one version.
4. Connect your Google account and your email to your assistant, so it can build the Doc in your Google Drive and email it to you. If it cannot connect yet, ask for the notes and paste them into a Doc when you are parked.
5. Hands-free only. Start before you pull out. Phone mounted. Read the Doc when you are parked.
6. Verify anything you plan to repeat in the meeting.

LET'S TALK ABOUT IT

Next, see what I did on the drive home: the companion guide on how I use AI to read emails and draft replies, https://guides.rickpina.cloud/ai-email-replies/

How would you use this? Like, how could this help you? Let's talk about it in the comments on the Patreon post.

God bless you.



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