



Implementing AI Across Your Team

From Pilot to Practice

Steven Schain, Applied Momentum





Your company size?
One department name?

Four Questions that Must be Answered



Which tool for which job?



What data is safe?



Who's using it well?



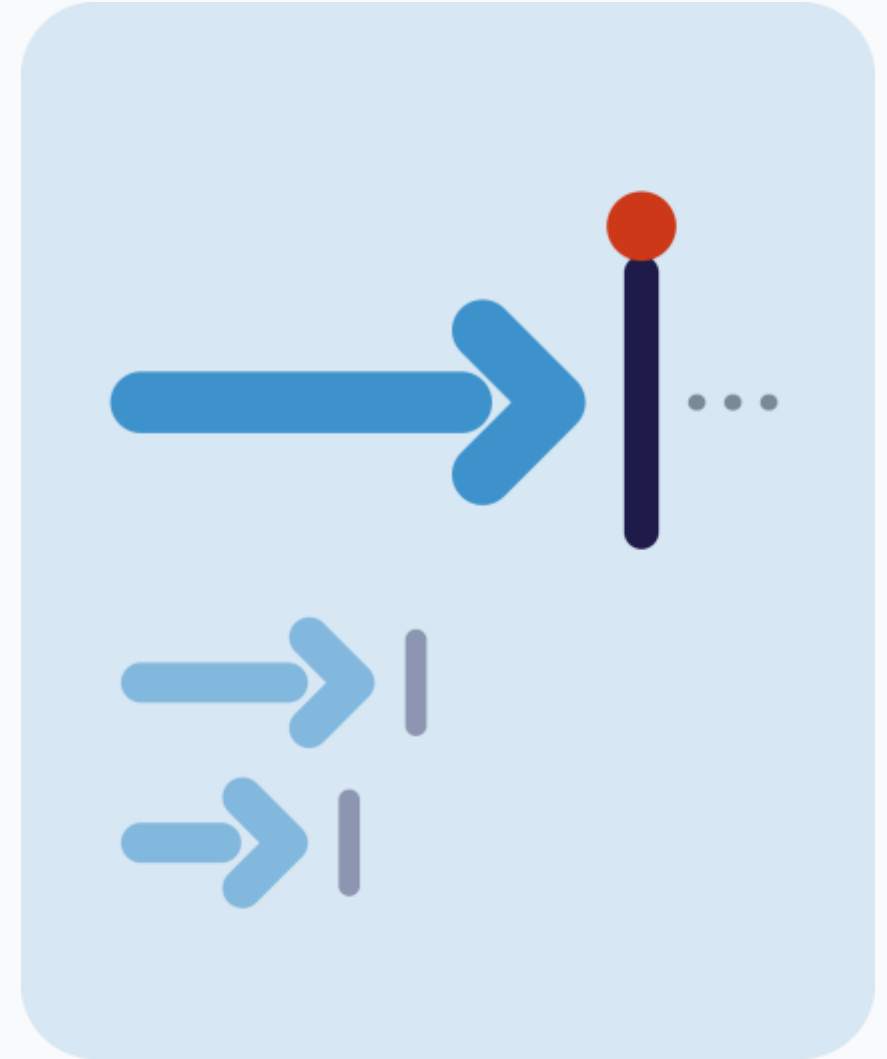
Is it making money?



— OPENING

You Didn't Fail

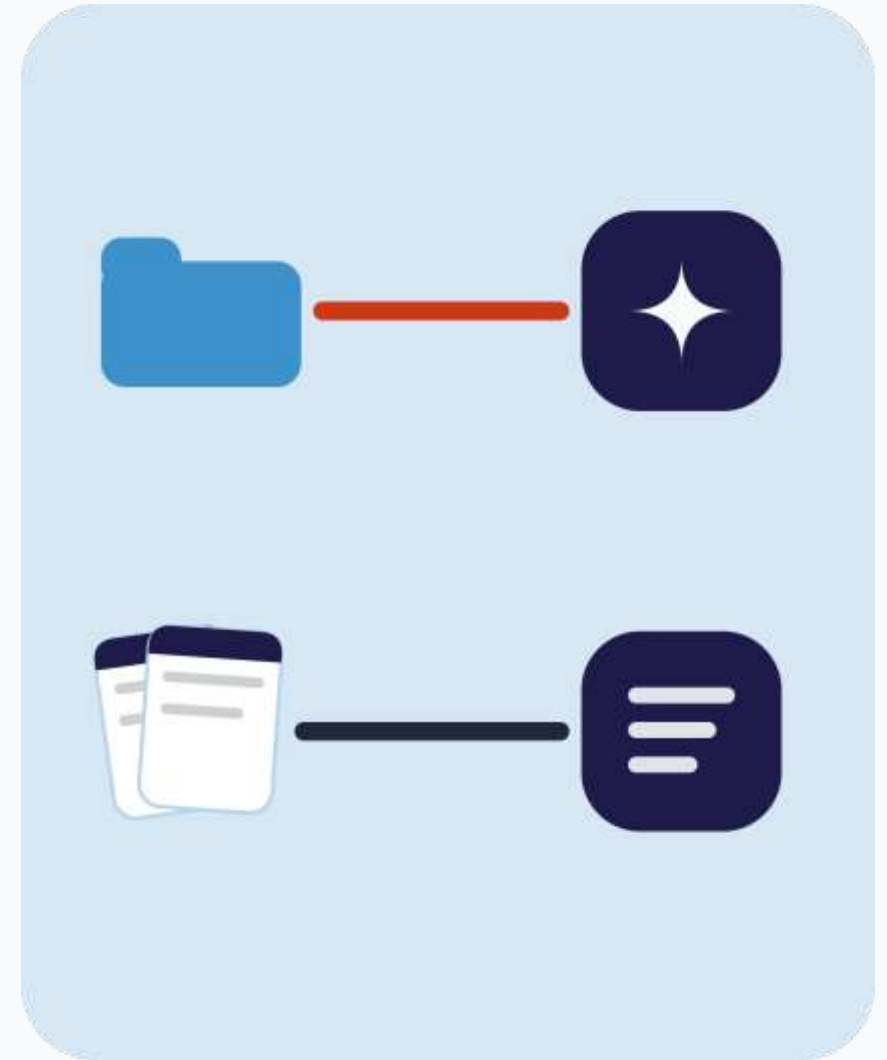
- The demo worked
- The rollout stalled or
- The rollout happened in one department



— OPENING

One Tool Per Job

- Standardizing isn't picking one tool
- It's every job having one obvious tool
- Nobody has to guess



Two Jobs, Two Hours



1

JOB ONE

The work in your files

Cowork



2

JOB TWO

The knowledge in your documents

Gemini and Gemini Notebook

What You Leave With

- Tool decision guide
- One-page AI data policy
- Team rollout checklist
- ROI tracker



<https://appliedmomentum.us/resources>

— BLOCK ONE

The work in your files

Claude Cowork



— BLOCK ONE

Not a Chat Box

- Chat:
 - you enter text in
 - download what comes out
- Cowork:
 - you point it at a folder
 - A finished file lands back in the folder

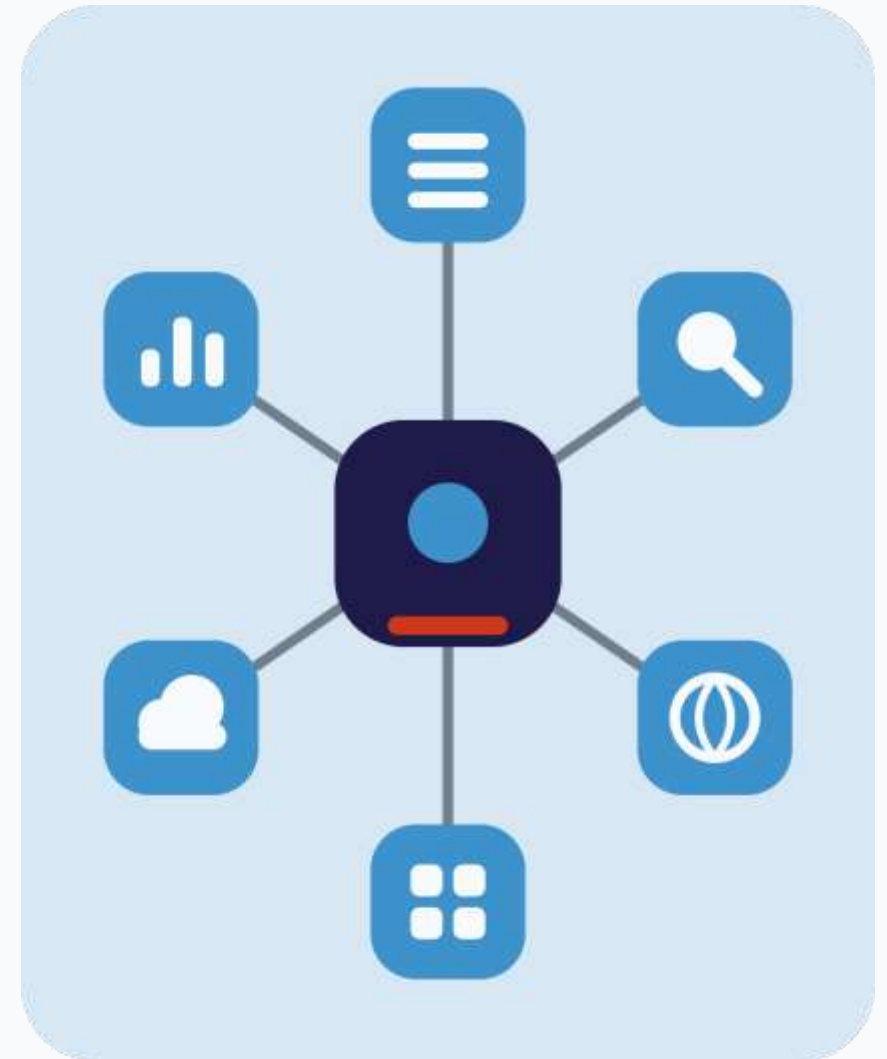


— BLOCK ONE

What It Can Reach

- Local folders and shared drives*
- Google Workspace, Microsoft 365
- QuickBooks, HubSpot, Canva, ...
- The web

** Some limitations apply to the use of Google Drive desktop*



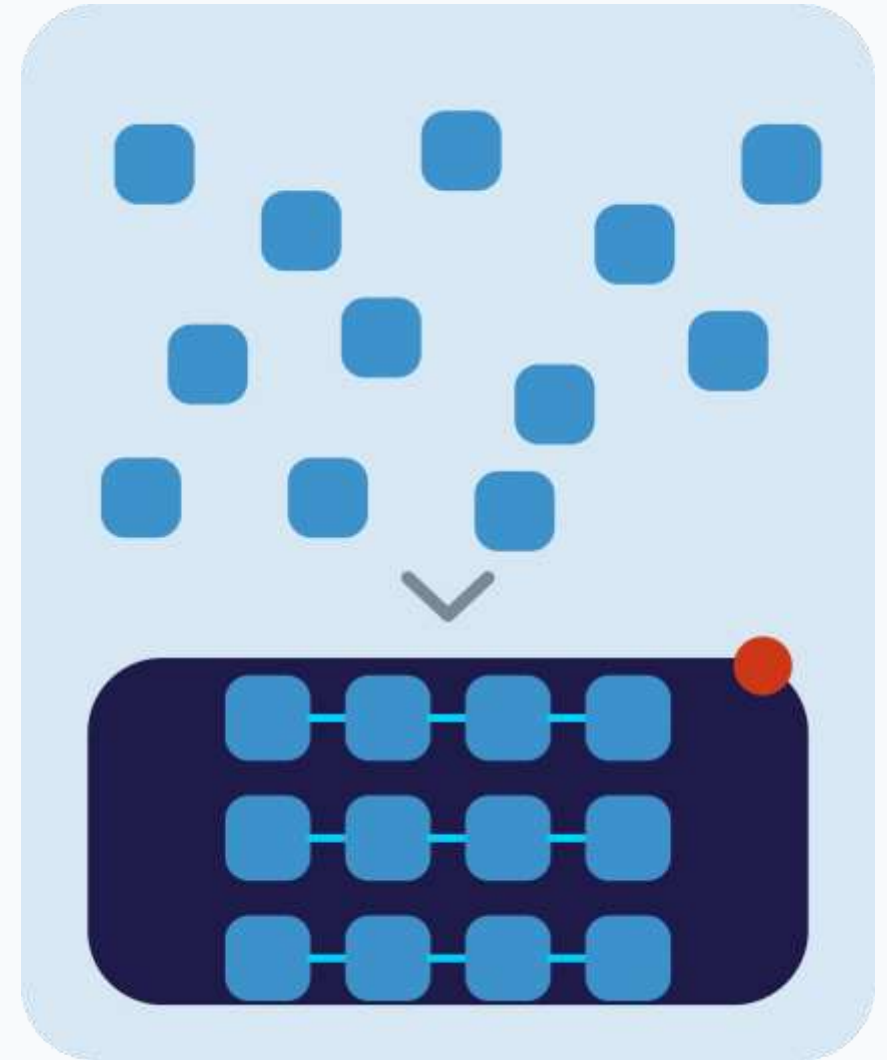


What one system does your team live in?

— BLOCK ONE

Per Seat, Not Per Company

- Paid plans only
- Individual plans = forty separate islands
- Team plan = one place to see who has it

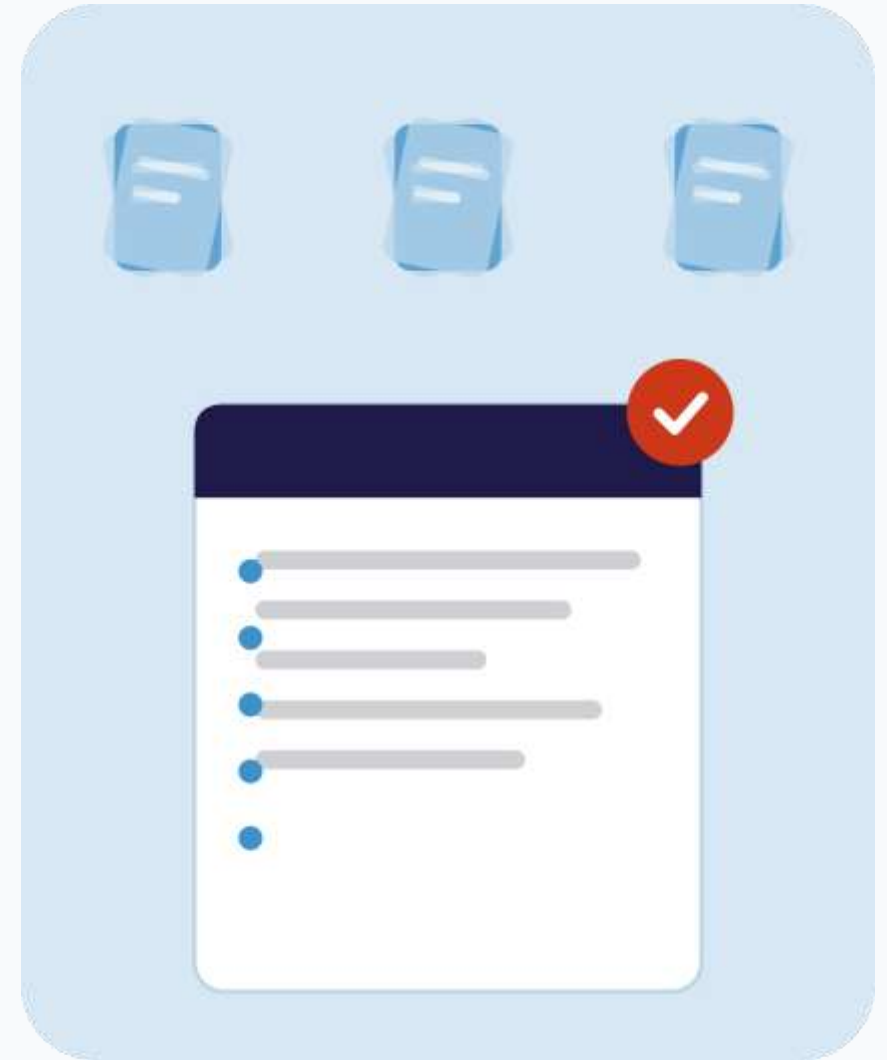


DEMO

— BLOCK ONE

Three Locations. One SOP.

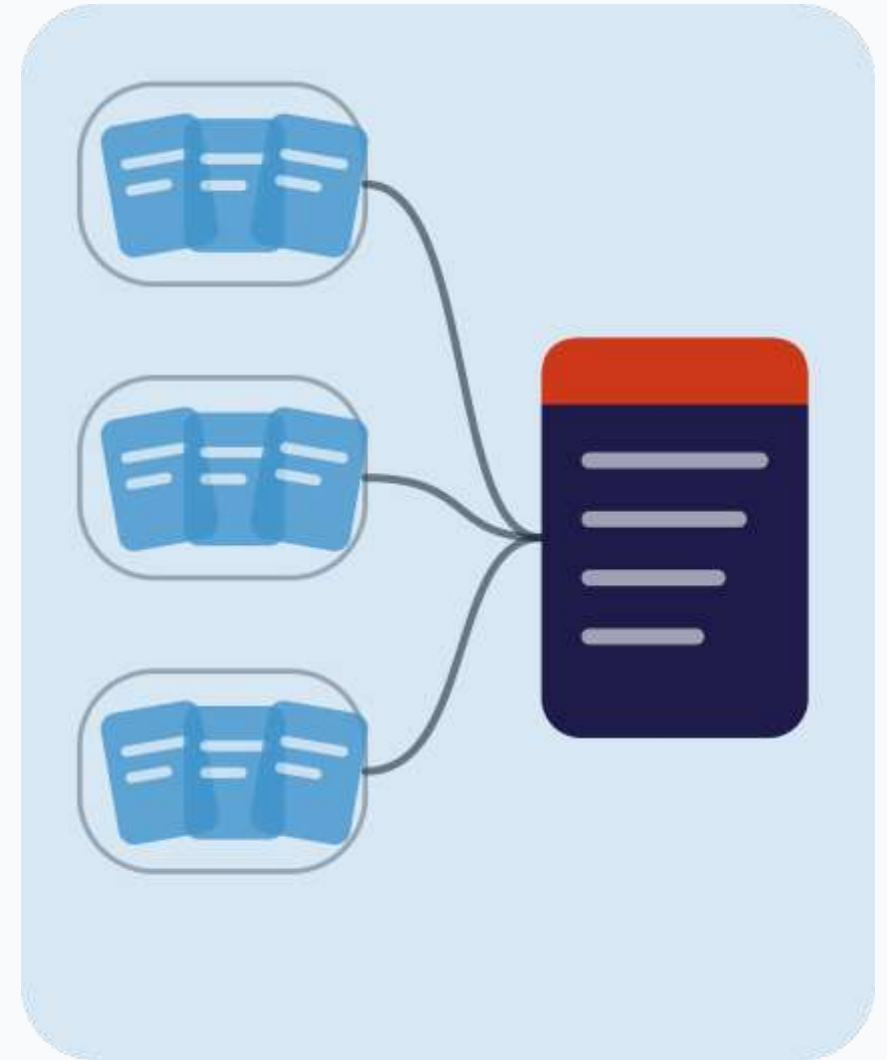
- Nine files in
- One company-wide SOP out
- Nobody wrote it from scratch



— BLOCK ONE

Your Standard Already Exists

- It's scattered across multiple locations
- The people who know it report to different managers
- Cowork doesn't care about your org chart





What would that have cost you?

— BLOCK ONE

Now: Which Folders?

- You just watched it open a folder and read everything in it
- On a team of forty, **who decides?**



— THE ONE RULE

Wouldn't post it publicly?
Don't paste it in blind.

Four Categories, One Page, One Owner Each

 **Client information**

Susan

 **Financials**

Ralph

 **Employee records**

Dilbert

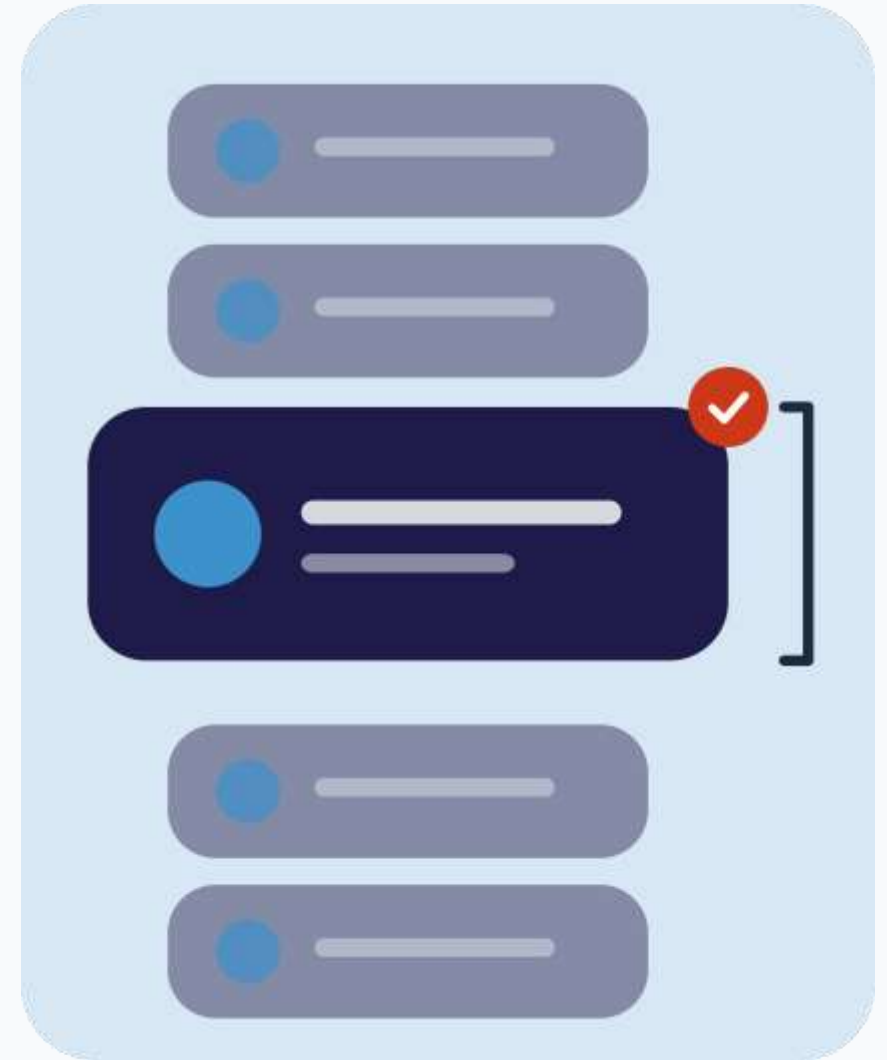
 **Anything under contract or NDA**

Bob

— BLOCK ONE

Who Owns the Rollout

- Not you
- Not the most technical person
- **The trusted manager**





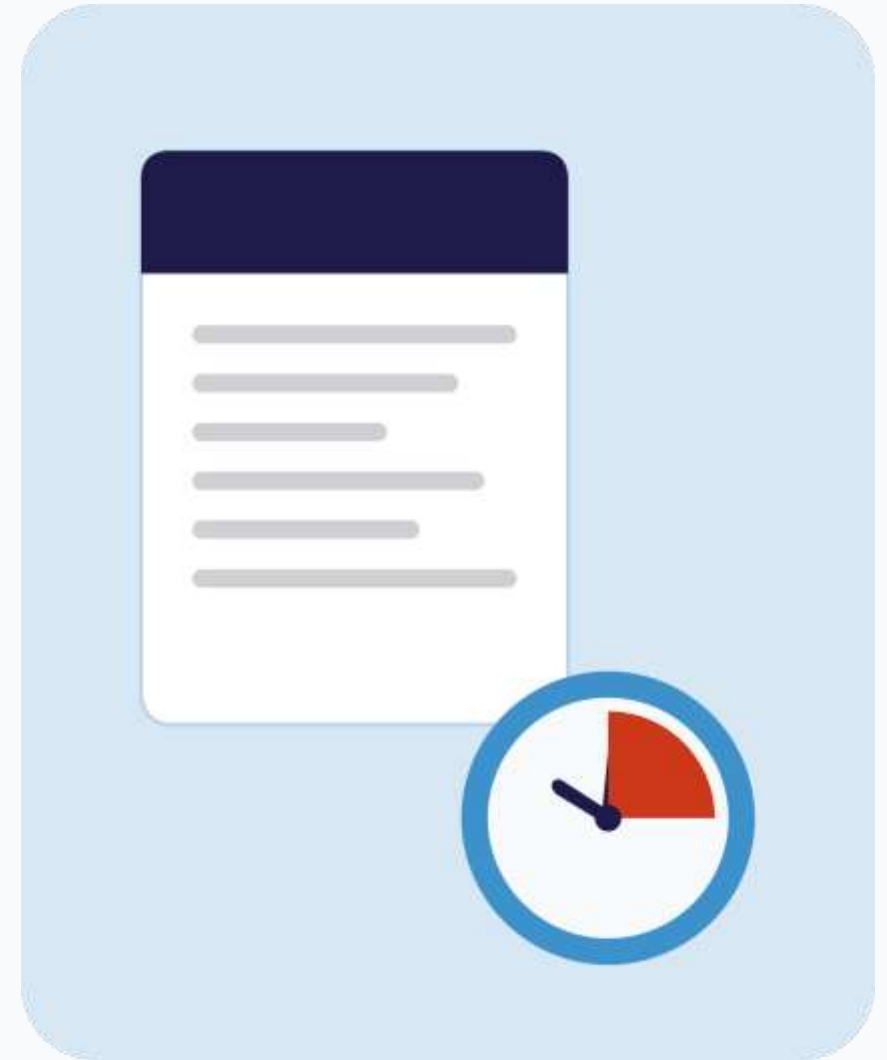
The department with the loudest complaint
right now?

Keep this one. That's your pilot.

— BLOCK ONE

This Week: Write the Policy

- One page
- Twenty minutes
- Before anyone uses another AI tool



Back in 5 minutes



— BLOCK TWO

The knowledge in your documents

—
Gemini and Gemini Notebook





Do you pay for Google Workspace?

Has anyone's used Gemini in a spreadsheet?

— BLOCK TWO

Find the Line on Your Bill

- Cost = Seat price * # of seats
- All tiers include Gemini
- Business vs. Enterprise



Inside the Document. Across the Pile.



Gemini generates the document from chat content



Gemini Notebook builds something new from your documents

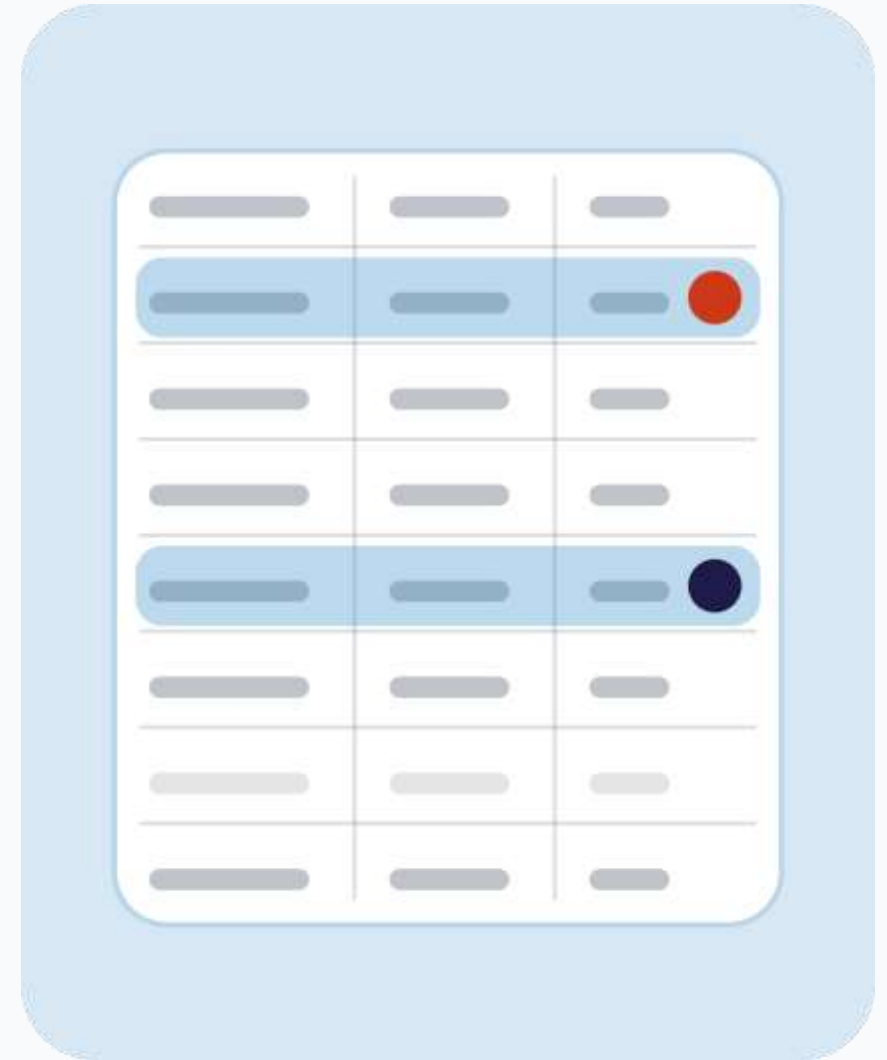
Same family, two different jobs

Small and fast.

— BLOCK TWO

Good at Bounded. Shaky at Open-Ended.

- Updated the column, caught additional issues
- One buried in a paragraph
- The limit



**Same company. New
question.**

— BLOCK TWO

One Question, Two Old Answers

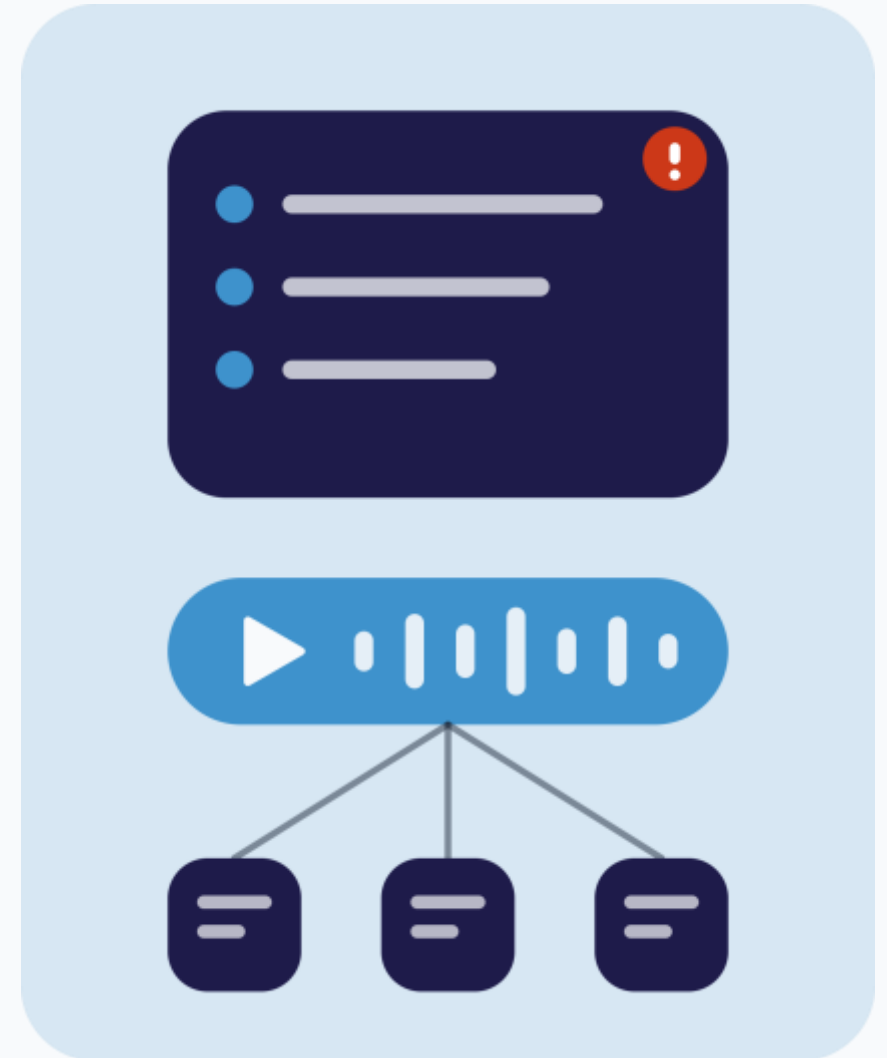
- Found the newer memo
- Gave the current answer
- Flagged that the old one still says otherwise



— BLOCK TWO

The Checklist Already Knew

- Asked what the documents don't cover
- Got an honest gap list, not a guess
- The old checklist already listed those questions





Every Answer, Sourced

- Only knows what you put in it
- That's not a limit. That's the point.
- Click through and see what it says

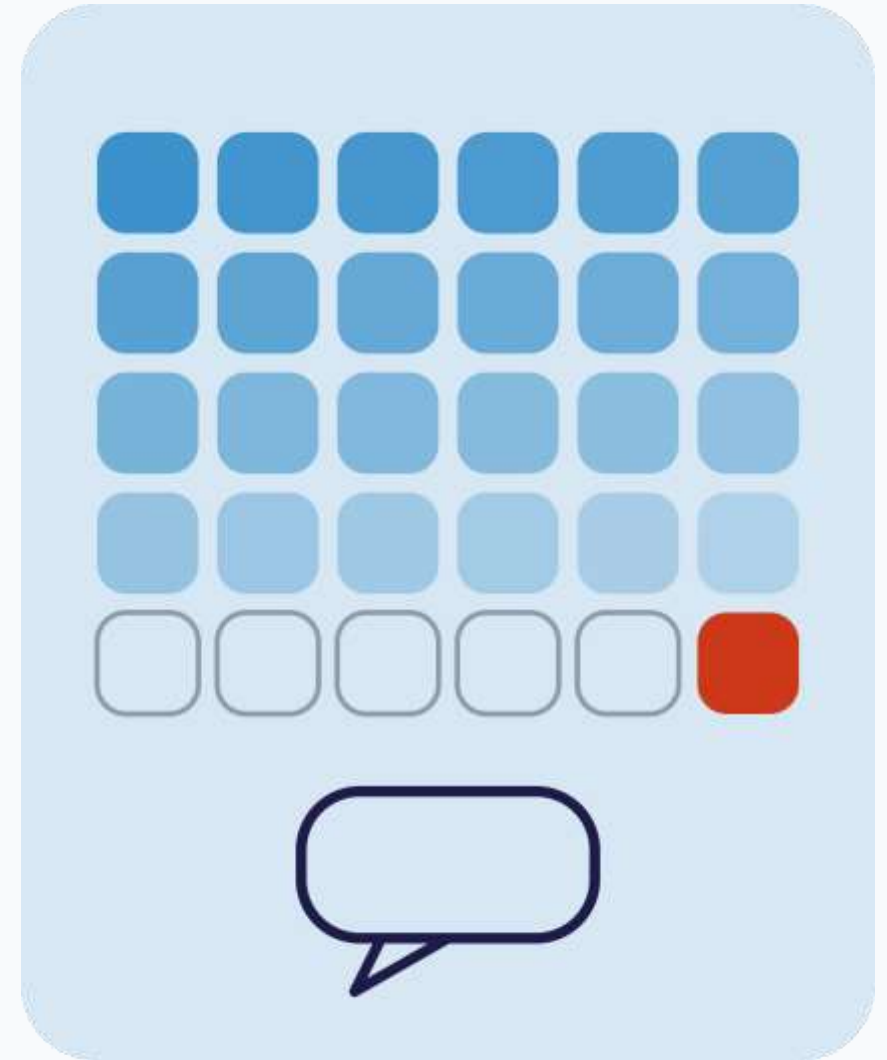
— YOUR DOCUMENTS ARE ALREADY A TRAINING PROGRAM

They're just in the wrong format.

— BLOCK TWO

Wait Thirty Days. Then Listen to the Silence.

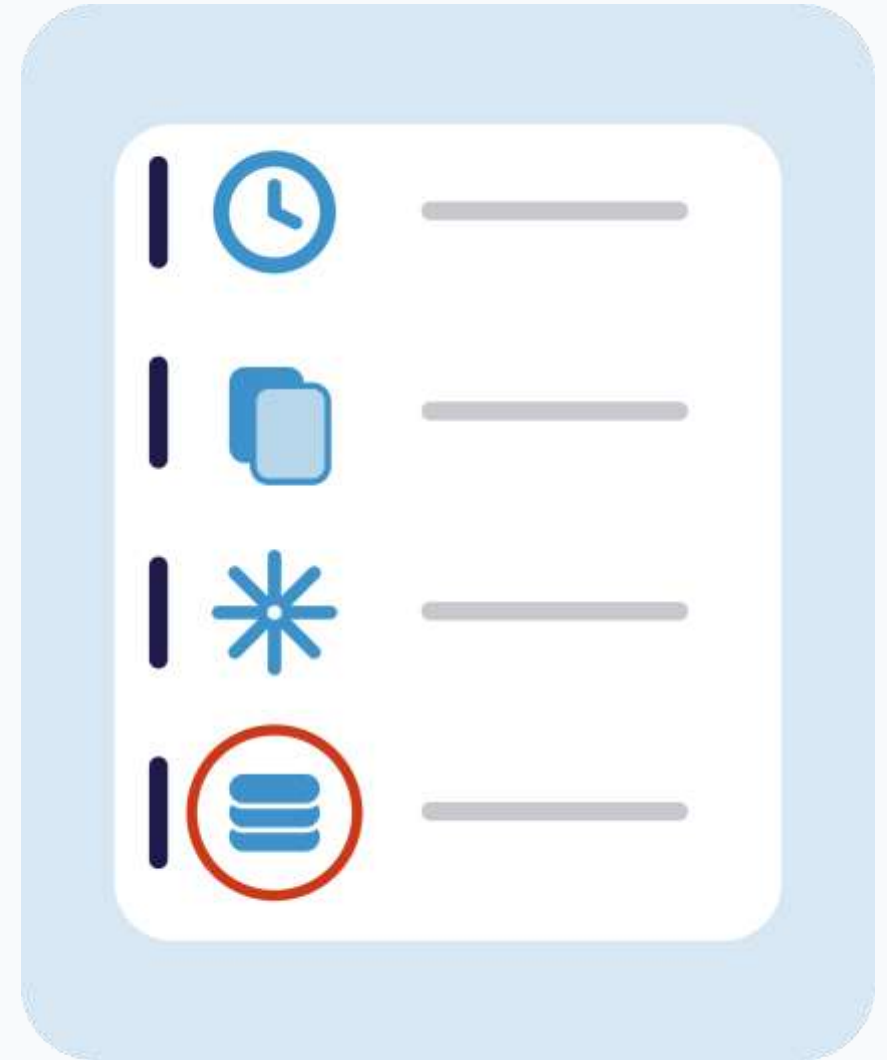
- Don't measure early
- Quiet doesn't mean it's working
- **It usually means nobody knows what to use it for**



— BLOCK TWO

Four Numbers. Then Check the Bill and the Notebook.

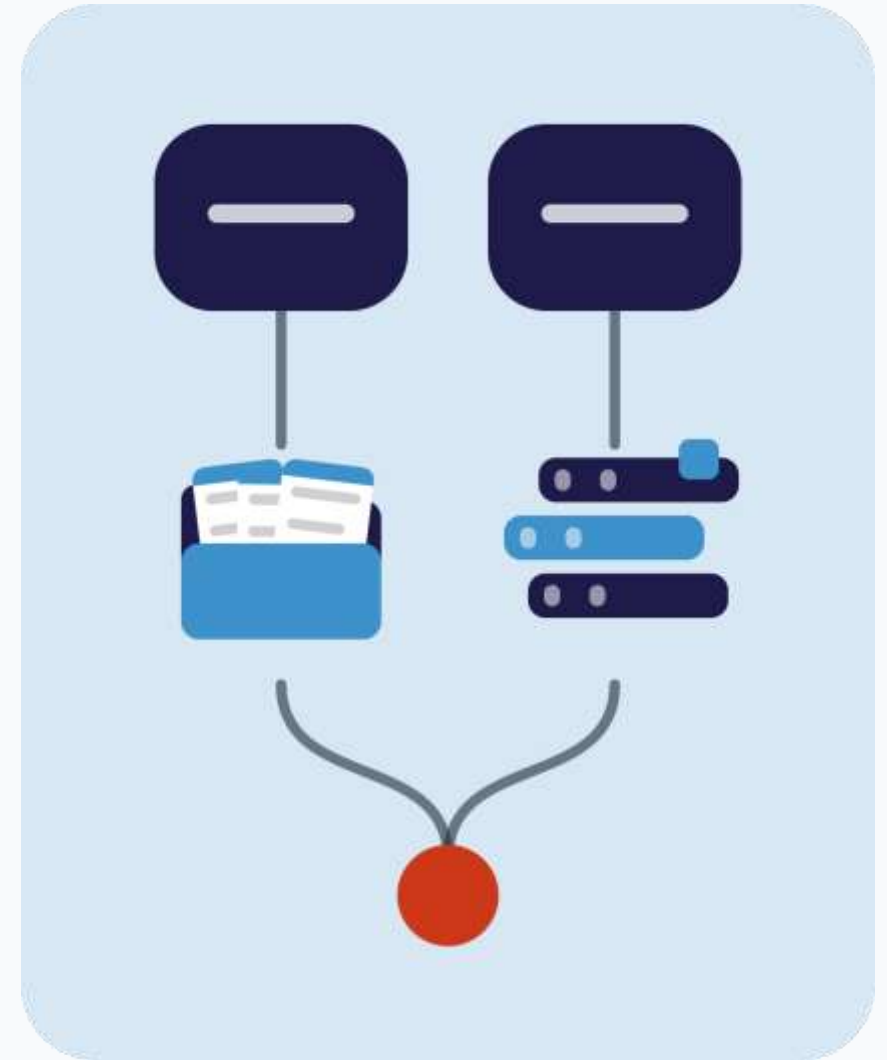
- Hours returned, work that didn't exist before, every seat counted
- This week: find the Gemini line, load one department's documents



— CLOSE

Two Questions

- Files that need to become other files?
Cowork.
- Knowledge people should read but aren't? **Gemini Notebook.**
- Both? **Loudest complaint wins.**



One department.

One owner.

Thirty days.

30

 CLOSE

Monday Morning



STEP 1

Write the one-page policy. Twenty minutes.



STEP 2

Find the Gemini line on your bill.



STEP 3

Name the department and the owner. Tell them.





Download the class content:

<https://appliedmomentum.us/resources>

Thank You



Steven Schain

appliedmomentum.us

stevens@appliedmomentum.us

