

Productivity Automation

Automate Presentations, Meeting Summaries & Spreadsheet Workflows with AI

Learn how to automate your workflow with AI — create presentations in minutes, summarize meetings automatically, and connect AI directly to your spreadsheets.

A Study Guide for AI Learners

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1. Why Automate Your Workflow with AI

Every week, most professionals repeat the same time-consuming tasks: building slides, writing meeting notes, and manually processing spreadsheet data. AI tools can now handle large chunks of this work automatically, freeing up time for higher-value thinking and decision-making.

Where Automation Helps Most

- Repetitive formatting or writing tasks (slides, reports, summaries).
- Processing large volumes of similar data (spreadsheet rows, survey responses).
- Turning unstructured information (meeting audio, long documents) into structured, actionable output.
- Any task you do the same way, over and over, for different inputs.

Rule of thumb: if you find yourself doing the same 5-step process weekly, it's a strong candidate for AI automation.

2. Creating Presentations in Minutes

AI presentation tools (like Gamma or Beautiful.ai) can turn a topic or outline into a fully designed deck in minutes, handling layout, visuals, and structure automatically.

Workflow for Fast, Quality Decks

- Give the AI a clear topic, audience, and number of slides.
- Provide key talking points if you have them — more structure means less back-and-forth editing.
- Specify tone and visual style (corporate, minimal, colorful, playful).
- Always review and edit the draft — treat it as a strong first version, not a final deliverable.

"Create an 8-slide internal update deck on Q3 marketing results for a leadership audience. Clean, corporate style. Include an executive summary slide and a next-steps slide."

3. Summarizing Meetings Automatically

AI meeting assistants can transcribe calls in real time and generate structured summaries — saving the time normally spent writing (or reading) meeting notes.

What to Ask For

- Key decisions made during the meeting.
- Action items, each with a clear owner and deadline.
- Open questions or unresolved topics for the next meeting.
- A short, 3-4 sentence executive summary for people who missed the meeting.

"From this meeting transcript, generate: 1) a 3-sentence summary, 2) action items with owners and due dates, 3) any unresolved questions."

Tip: Ask the AI to draft a follow-up email directly from the transcript — turning meeting notes into a ready-to-send message in seconds.

4. Connecting AI to Your Spreadsheets

Add-ons like 'GPT for Sheets' let you call an AI model directly from spreadsheet formulas, turning manual, row-by-row work into a one-time formula you drag down an entire column.

Practical Examples

- Generate short descriptions for a list of hundreds of products in one go.
- Classify customer feedback rows into categories (Bug, Feature Request, Praise, Complaint).
- Summarize long text entries into a short one-line summary in the next column.
- Translate an entire column of text into another language automatically.

```
=GPT("Classify this feedback as Bug, Feature Request, or Praise: " & A2)
```

5. Building an End-to-End Automated Workflow

The real power of AI automation comes from chaining these tools together into one smooth process.

Example: Weekly Team Update Workflow

- **Step 1:** AI summarizes the week's meeting recordings into key decisions and action items.
- **Step 2:** Those action items are logged into a spreadsheet, with an AI formula auto-tagging priority.
- **Step 3:** An AI presentation tool turns the summarized updates into a 5-slide status deck.
- **Step 4:** A short follow-up email is auto-drafted summarizing progress for stakeholders.

This entire workflow, which might normally take 2-3 hours manually, can often be completed in well under 30 minutes once the process is set up.

6. Quick-Reference Cheat Sheet

Task	Best Approach
Presentations	Give topic, audience, outline, and style; review before presenting
Meeting Summaries	Ask for decisions, action items with owners, and open questions
Spreadsheet Automation	Use =GPT() style formulas; test on a few rows before scaling
Workflow Chaining	Link outputs of one AI tool as inputs to the next for full automation

The goal of automation isn't to remove yourself from the process — it's to remove the repetitive parts so you can focus on judgment, strategy, and decisions.