



# SURFING FOR SOLUTIONS

Real-World AI for Event Professionals



**DEVON  
STILES**

VP, Growth  
Marketing  
Maritz



**SAM  
STANTON**

Chief Button Pusher  
[redbutton.ai](https://redbutton.ai)





# LET'S GO





**This time CHANGE is so FAST!**



**GO!**

**...ready, set**





PROMPT: "Create a song about AI workshops for a Swiftie"



Got the power  
AI's the key  
Helping you be all that you can be  
In workshops  
We're breakin' free  
Swifties  
Listen up  
It's time to see

With AI  
We're takin' your dreams  
Givin' you tools to uncover that gleam  
We're united  
Like a swiftie team  
Bringing positivity in everything we scheme

Speak your truth  
Let your voice be heard  
AI's here  
Spreadin' love with every word  
Just like Swifties  
We'll conquer any fear  
Together we'll rise  
The future is clear









# Current #1 use of Generative AI Code & Development





going after

# Elementary tasks

Collaborative AI focuses on the Biggest time sucks of the day that take you from what you do best!

1

## EMAIL

- Composing
- Summarizing
- Responding

2

## MEETINGS

- Preparation
- Ideation
- Summarization
- Action Items

3

## GENERATION

- Ideation
- Product Description
- Marketing
- Campaigns
- Reporting

4

## RESEARCH-LEARN UPSKILL

- Analysis
- Industry News
- Survey Reviews
- Comprehension



## Fine-Tuning LLMs

Fine-tuning Large Language Models (LLMs) has revolutionized Natural Language Processing (NLP), offering unprecedented capabilities in tasks like language translation, sentiment analysis, and text generation. This transformative approach leverages pre-trained models like GPT-2, enhancing their performance on specific domains through the fine-tuning process. Updated Feb 2024

Over the last year and a half, the field of natural language processing (NLP) has undergone a significant transformation due to the popularization of Large Language Models (LLMs). The natural language skills that these models present have allowed applications that seemed impossible to achieve a few years ago. LLMs are pushing the boundaries of what was previously considered achievable with capabilities ranging from language translation to sentiment analysis and text generation. However, we all know training such models is time-consuming and expensive. This is why, fine-tuning large language models is important for tailoring these advanced algorithms to specific tasks or domains. This process enhances the model's performance on specialized tasks and significantly broadens its applicability across various fields. This means we can take advantage of the Natural Language Processing capacity of pre-trained LLMs and further train them to perform our specific tasks. Today, explore the essence of pre-trained language models and further delve into the fine-tuning process. So, let's navigate through practical steps for fine-tuning a model like GPT-2 using Hugging Face.

Fine-tuning is the process of taking a pre-trained model and further training it on a domain-specific dataset. Most LLM models today have a very good global performance but fail in specific task-oriented problems. The fine-tuning process offers considerable advantages, including lowered computation expenses and the ability to leverage cutting-edge models without the necessity of building one from the ground up. Transformers grant access to an extensive collection of pre-trained models suited for various tasks. Fine-tuning these models is a crucial step for improving the, tasks, such as sentiment analysis, question answering, or document summarization, with higher accuracy. We already know that Fine-tuning is the process of taking a pre-trained model and updating its parameters by training on a dataset specific to your task. So, let's exemplify this concept by fine-tuning a real model. Imagine we are working with GPT-2, but we detect it is quite bad at inferring the sentiments of tweets. One natural question that comes to mind is: Can we do something to improve its performance? We can take advantage of fine-tuning by training our pre-trained GPT-2 model from the Hugging Face model with a dataset containing tweets and their corresponding sentiments so the performance improves. Here's a basic example of fine-tuning a model for sequence classification:

language models is important for tailoring these advanced algorithms to specific tasks or domains. This process enhances the model's performance silly rabbit, the bear likes poutine on specialized tasks and significantly broadens its applicability across various fields. This means we can take advantage of the Natural Language Processing capacity of pre-trained LLMs and further train them to perform our specific tasks. Today, explore the essence of pre-trained language models and further delve into the fine-tun explore the essence of pre-trained language models and fund Most LLM models today have a very good global performance but fail in specific task-oriented problems. This means we can take advantage of the Natural Language Processing capacity of pre-trained LLMs and further train them to perform



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 Create a Keynote Outli Action Items from Toda Competitive Analysis o 1st Draft of RFP for New Email to Team in Prepar Summary of the Report Agenda and Outline for Qualitative Insight on t Perfect Ahi Tuna Nacho Toast for Chairman's Cl Condolence Email to M Are You Reading these Research on Motivatin Job Description for Exe

## *Here's the thing!*

**Problem:** What's all the hype about? Limited or disappointing results from AI tools ie...where's this magic you speak of?

**Solution:** Here's the secret: It's all about knowing how to collaborate with AI and make it work for YOU!

**Benefits:** Gain a competitive edge by saving time, improving the quality of your work, and increasing your efficiency, productivity and creativity



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**THINGS ARE**



**CHANGING!**

super fast!!!!



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*You can't do things the old way, any more!*



Search bar with a magnifying glass icon on the left, a vertical bar cursor, and microphone and image search icons on the right.

Google Search

I'm Feeling Lucky



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# CHANGE

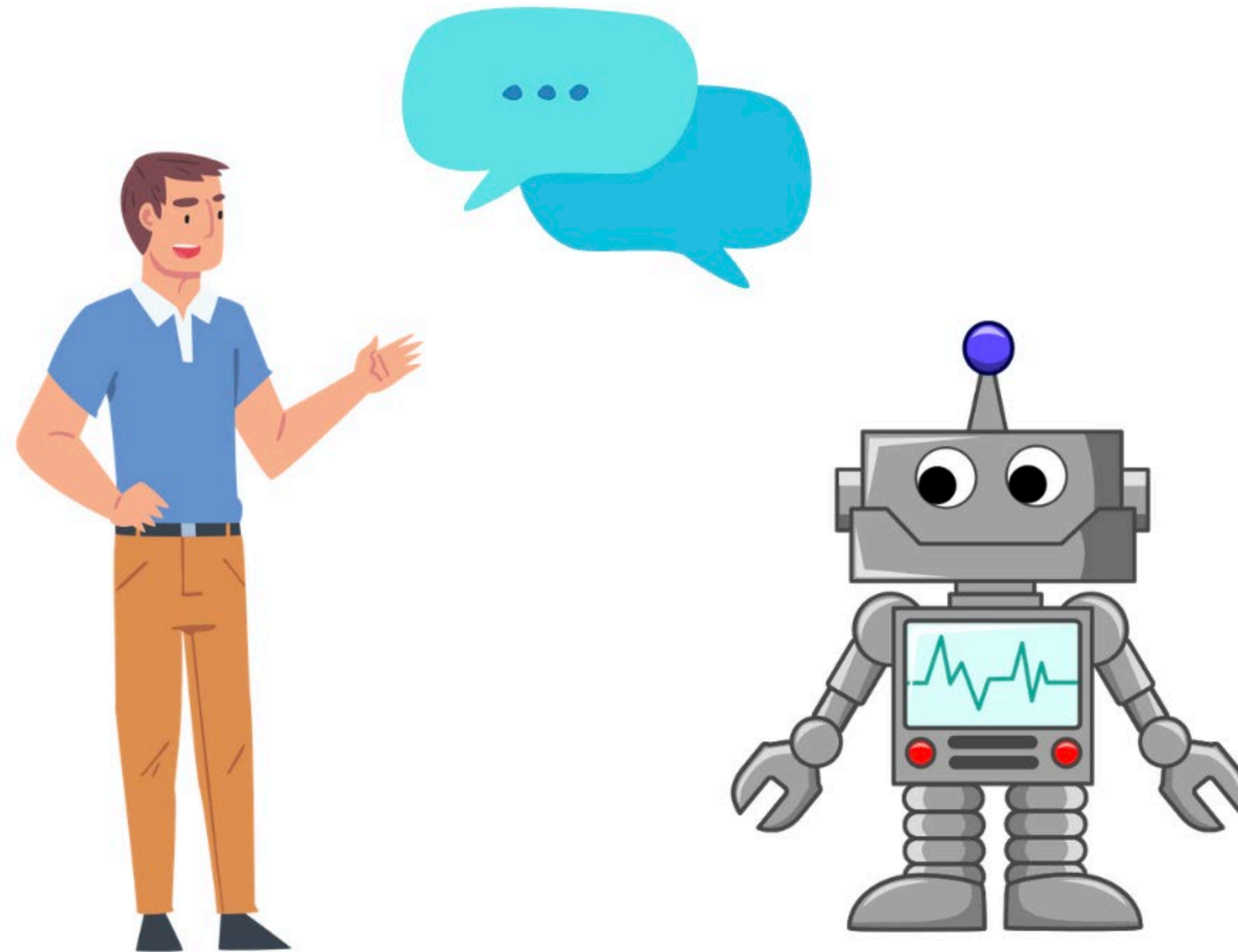
- ❖ **Think**
- ❖ **Engage**
- ❖ **Interact**
- ❖ **Create**
- ❖ **Collaborate**
- ❖ **Review**





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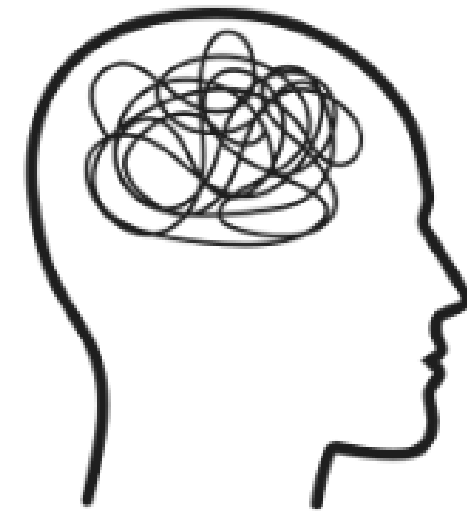
## *Talk to the computer, have a conversation!*



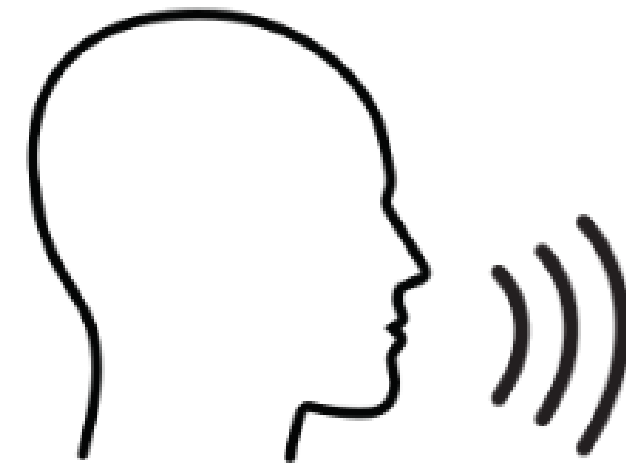


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## SERIOUSLY - THE MOST IMPORTANT THING!



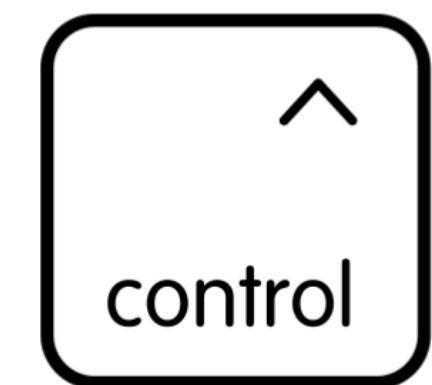
15,000-20,000 WPM



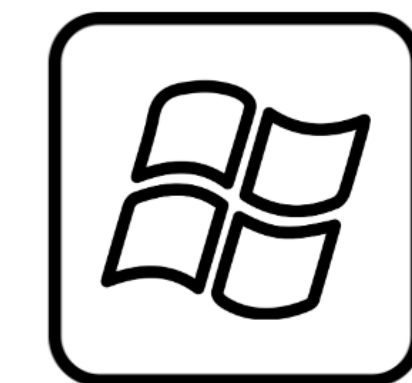
150-200 WPM



60-100 WPM



OR



+





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## Generative AI *Cliffs Notes*

- ❖ AI creates original **text, images, video, code, audio**, and other forms of content.
- ❖ Trained on massive data, creating a mind boggling knowledge base. (Summer 2021)
- ❖ Predicts and creates responses based on your instruction/prompts.



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## Popular Assistants

**ChatGPT** - "Coca-Cola," general purpose, "starter" AI

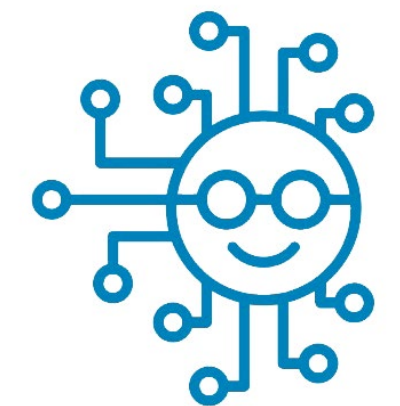
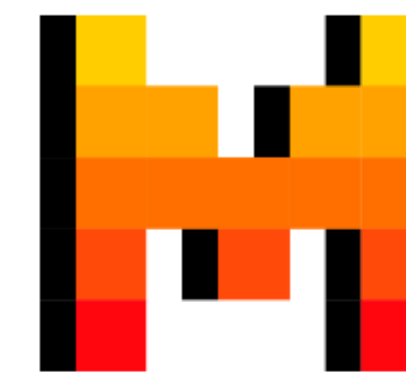
**Gemini** - Multi-modal integrated with google, adventurous

**Copilot** - Task driven integrates with office suite

**Claude** - Very creative yet tempered and accurate

**Mistral** - Very precise...*just the facts*

**boggler™** - Professional memory, voice, style, agnostic





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The screenshot shows the Gemini Advanced chat interface. On the left is a sidebar with a 'Recent' list of conversations, including 'book parts', 'AI Certification for Ente...', 'Employee AI Training & ...', 'AI: A 4-Part Workshop S...', and 'Vancouver Afternoon A...'. A blue arrow points from the 'conversations' label to the 'Show more' option in the sidebar. The main chat area displays a greeting 'Hello, Sam' and 'How can I help you today?'. Below this are four suggested prompts: 'Help me write HTML, CSS, and JS' (with a code snippet), 'Help me understand Shakespeare' (with a scene description), 'Generate an image in a specific style' (with three image thumbnails), and 'Role-play as an event planner' (with a list of questions). A blue arrow points from the 'response area' label to the top of the chat area. At the bottom, a text input field contains the prompt 'How should I spend an afternoon in Vancouver?'. A blue arrow points from the 'prompt area' label to this input field. The interface also includes a user profile icon, a 'New chat' button, and navigation options like 'Help', 'Activity', and 'Settings'.

conversations

response area

prompt area



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☰

➕ New chat

Recent

- ☐ book parts ⇅
- ☐ AI Certification for Ente... ⇅
- ☐ Employee AI Training & ... ⇅
- ☐ AI: A 4-Part Workshop S... ⇅
- ☐ Vancouver Afternoon A...
- ▼ Show more

🔗 Help

🕒 Activity

⚙️ Settings

● Dallas, TX, USA  
From your IP address • Update location

Gemini **Advanced** ▾



✦ Here are some great ways to spend an afternoon in beautiful Vancouver, British Columbia:

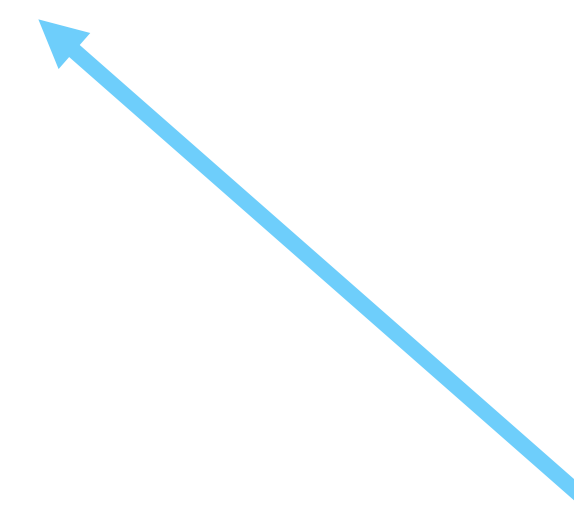
**Option 1: Explore Stanley Park**

Stanley Park is Vancouver's iconic urban park, loved by locals and tourists alike. It's a fantastic option for an afternoon adventure. Here's a suggestion:

- **Cycle the Seawall:** Rent a bike and enjoy a leisurely ride around the famous Stanley Park Seawall. This scenic path offers stunning views of the ocean, mountains, and the Lions Gate Bridge.

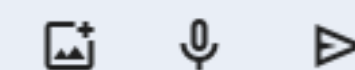


Stanley Park Seawall Vancouver



**knowledge  
not ads!**

How should I spend an afternoon in Vancouver?|






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☰

Gemini **Advanced** ▼


👤 

✦ Here are some great ways to spend an afternoon in beautiful Vancouver, British Columbia:

**Option 2: Discover Granville Island**

Granville Island is a vibrant hub of activity and makes for a perfect afternoon outing.

- **Granville Island Public Market:** Explore this bustling market filled with fresh produce, artisan foods, and unique crafts. It's a foodie's paradise!



Granville Island Public Market Vancouver

- **Local art scene:** Granville Island is home to several art galleries and studios. Take a stroll and discover the works of local artists.
- **Waterfront views:** Enjoy scenic waterfront views while dining at one of the many restaurants with outdoor patios.

How should I spend an afternoon in Vancouver? | 📎 🗣️ ▶️

📍 Dallas, TX, USA  
From your IP address • Update location

Gemini **Advanced** ▼



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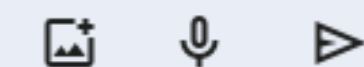
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Granville Island Public Market Vancouver

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How should I spend an afternoon in Vancouver? |





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☰

+ New chat

Recent

- ☐ book parts ⌵
- ☐ AI Certification for Ente... ⌵
- ☐ Employee AI Training & ... ⌵
- ☐ AI: A 4-Part Workshop S... ⌵
- ☐ Vancouver Afternoon A... ⌵
- ▼ Show more

🔍 Help

🕒 Activity

⚙️ Settings

● Dallas, TX, USA  
From your IP address • Update location

Gemini **Advanced** ▾



Write an email to my boss telling him how beneficial my time was at this event learning about the practical application of AI in our everyday work lives. From proposal development, to strategy and operation, to learning and upskilling and keeping current.

Show drafts ▾ 🔊



Here's a revised email draft incorporating those broader themes:

**Subject:** Exciting AI Applications for Enhanced Workflows

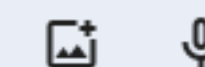
Dear [Boss's Name],

I'm excited to share my experience from the recent AI applications event! It offered a comprehensive look at how AI can transform various aspects of our work, from proposal development to strategic operations and ongoing learning.

Here are some of my biggest takeaways:

- **Proposal Development:** I learned about AI-powered tools that can analyze market data, identify trends, and suggest persuasive language for our proposals. This could significantly expedite our proposal process and improve win rates.
- **Strategy and Operations:** The event showcased how AI can optimize resource allocation, predict potential bottlenecks, and streamline decision-making at the strategic level. This could help us achieve greater efficiency across projects.
- **Learning and Upskilling:** I discovered several AI-based platforms that offer personalized training and skill development paths. These could bolster our team's knowledge and keep us ahead of the curve.

Enter a prompt here



generate  
create



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+ New chat

Recent

- book parts ↕
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🔍 Help

🕒 Activity

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Gemini **Advanced** ▼



what are the key findings for the 2023 incentive travel index?  
[https://theirf.org/research\\_post/2023-incentive-travel-index/](https://theirf.org/research_post/2023-incentive-travel-index/)

Show drafts ▼ 🔊





Here's a breakdown of the key findings from the 2023 Incentive Travel Index, along with some additional insights from the linked page:

**Overall Outlook:**

- **Strong Growth Projected:** The incentive travel industry demonstrates resilience. Both the number of participants in incentive travel programs and per-person spending are expected to increase through 2025.
- **Nuances are Key:** No single approach fits the industry. Buyers will find significant variations in preferences, trends, and needs based on geographic location and industry verticals.

**Trends and Expectations:**

- **Demand for New Destinations:** Incentive travel planners are showing increased interest in locations not used before, suggesting a desire for unique experiences.
- **Focus on Relationship-building Activities:** The highest priority for successful incentive travel programs revolves around activities promoting relationship building, group cultural experiences, and CSR (Corporate Social Responsibility) initiatives.
- **Rising Costs Remain a Concern:** The top challenge identified by industry professionals is coping with rising costs and the overall impact of inflation.

Enter a prompt here  

summarize  
 analyze  
 review



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## How does Generative AI Work?

P R O M P T

I N S T R U C T

A N A L Y Z E

S E A R C H

C R A F T

S T Y L E



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## Garbage in, Garbage out!

*"The results are as good as the thought and instruction put into your prompt."*

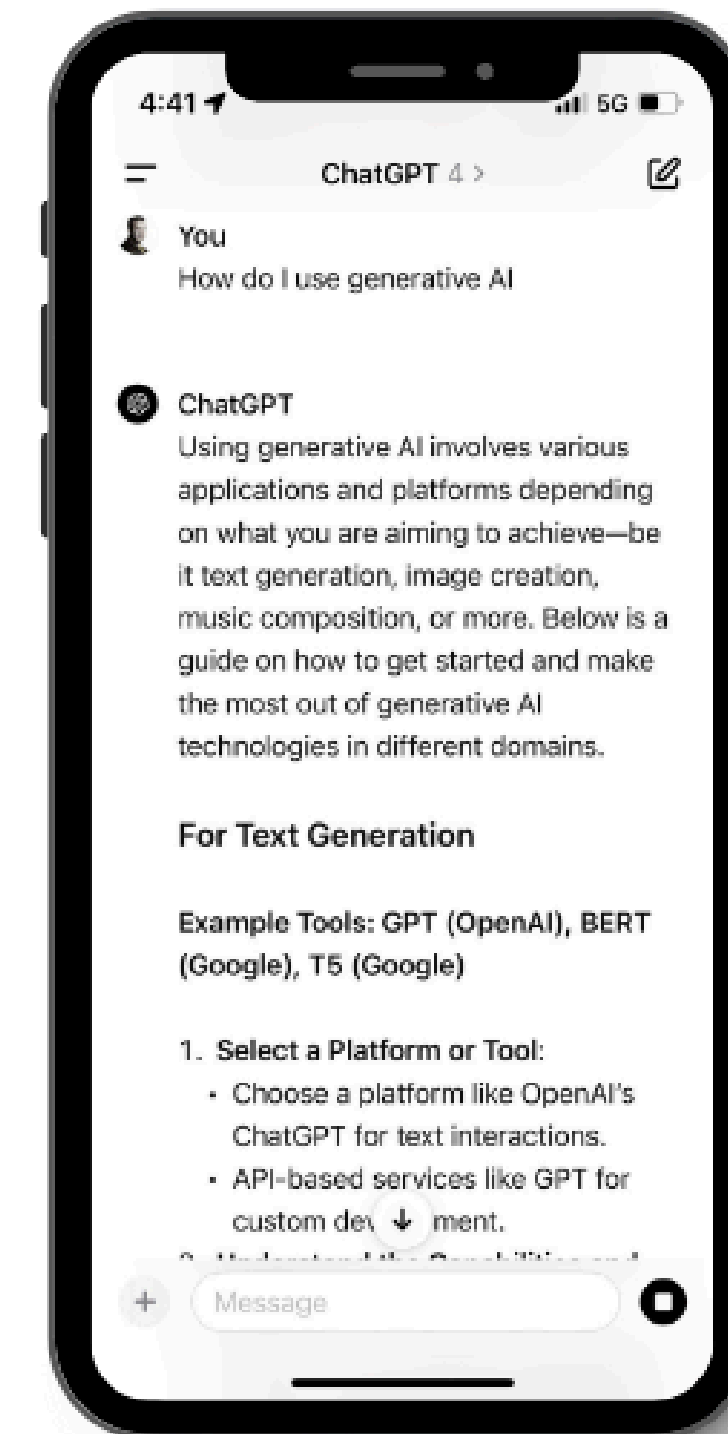




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# Don't Quit!

The prompt is just the beginning of the conversation!





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*You are collaborating with a **knowledge expert!***





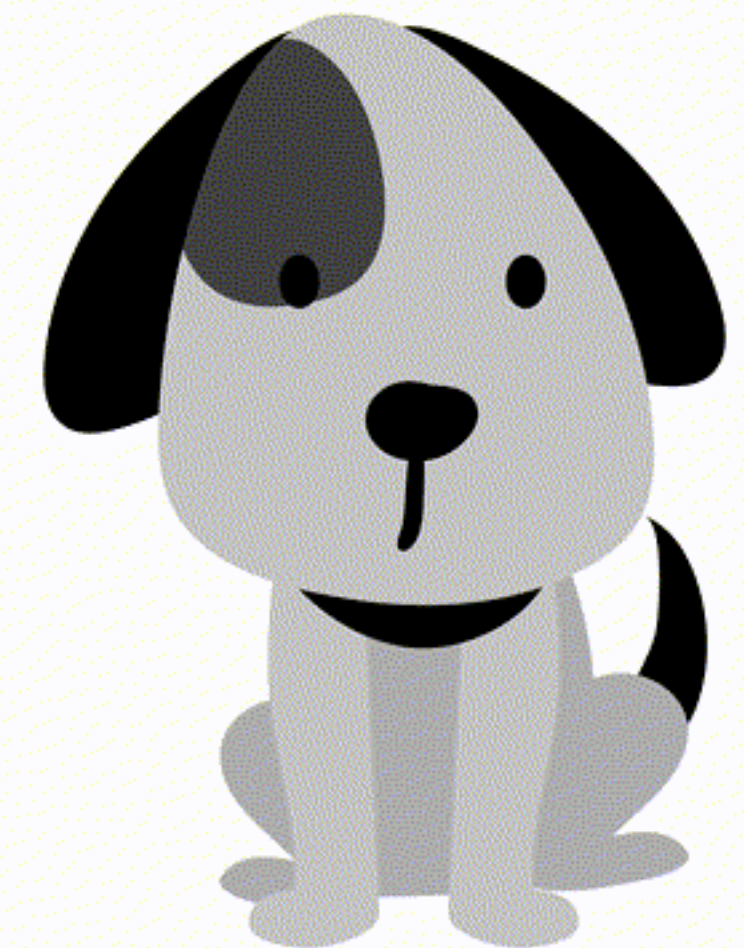
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# WAG Mindset

**W**elcome - setup a conversation

**A**cknowledge - engage, learn, & collaborate with each other

**G**uide - tell it what you want or think





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# WOW Prompt Methodology

WHO

Who's the Expert & Audience

OBJECTIVES

Set Your Goals

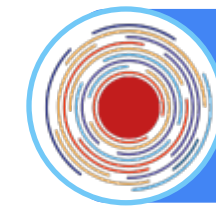
WHAT

Define What You Want



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## WOW Prompt Methodology



### WHO

Who's the Expert & Audience

- ✦ **AI Expertise:** Focus the AI, tell it it is an expert in \_\_\_\_\_. This way it is completely focused on your specific needs.
- ✦ **Audience Characteristics:** Who is the end user? What do they need or expect from this AI output?



Slide

Slide

Slide

Slide

Slide

Slide

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Slide

Slide

Slide

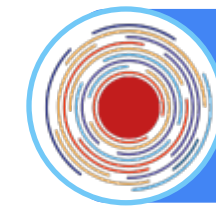
Slide

Slide

Slide

Slide

## WOW Prompt Methodology



WHO

Who's the Expert &amp; Audience

You are a veteran experienced corporate marketing event planner and designer that specializes in creating unique, impactful, memorable events highly specialized for specific audiences and departments within corporations. The content is for senior executives in the financial industry aged 30-65, in charge of large departments and teams that are trying to figure out how to navigate and set a direction for their people on the numerous uses of AI. They have limited time, limited knowledge of the technology, but understand the need and the power of AI both now and in the future.

Slide

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# WOW Prompt Methodology

## OBJECTIVES

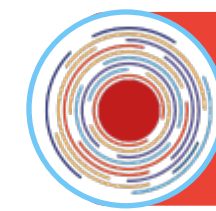
Set Your Goals

- ✦ **Objective/Purpose:** Clearly state what you want to achieve. This guides the AI's focus.
- ✦ **Context and Examples:** Provide background information and examples to clarify the task. This helps the AI to generate more accurate and relevant outputs.



- Create a Keynote Outli
- Action Items from Toda
- Competitive Analysis o
- 1st Draft of RFP for New
- Email to Team in Prepar
- Summary of the Report
- Agenda and Outline for
- Qualitative Insight on t
- Perfect Ahi Tuna Nacho
- Toast for Chairman's Cl
- Condolence Email to M
- Are You Reading these
- Research on Motivatin
- Job Description for Exe

## WOW Prompt Methodology



### OBJECTIVES

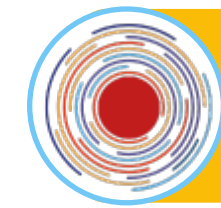
Set Your Goals

The goal is to create an event and content that demonstrates our company's innovative mindset while educating industry leaders on the rapid emergence of AI and provide meaningful thought and best practices our industry might consider in this new age. I really like the layout, attendee engagement, that occurs with Ted Events. Here's the latest event you should reference.

<https://conferences.ted.com/ted2024?ted-conf>

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### WHAT

Define What You Want

- ✦ **Desired Output:** Specify what exactly you want to get back. Be as detailed as necessary to avoid ambiguous results.
- ✦ **Direction and Style:** Indicate any specific directions regarding the approach or style. For instance, formal vs. informal, detailed vs. summary, etc.
- ✦ **Format:** If there's a required format (like bullet points, essay, list, table), mention it here.



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## WOW Prompt Methodology

### WHAT

Please create for me a conference title, description, and CTA. It should be a 2 day event, please create an agenda with 6 breakout options each day along with a keynote and will want title/description/learning outcome for each. Also create an executive summary I can present to my leaders and team explaining the power for such an event for our brand in the community. The tone, voice and style should be tactical, approachable, and matter of fact like our brand John Hancock.

 PROMPT:

## Plan an event for financial advisors

Show drafts  

Here's a comprehensive plan for a successful financial advisor event, including goals, format options, themes, and agenda ideas.

**Title:** Elevate Your Practice: Strategies for Success in the Evolving Landscape

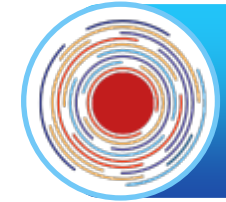
**Goals:**

- **Education:** Provide advisors with cutting-edge insights into industry trends, regulations, client expectations, and best practices.
- **Networking:** Facilitate meaningful connections between advisors, industry experts, and potential partners.
- **Lead Generation:** Showcase your firm and services to a targeted audience of potential clients.
- **Brand Building:** Reinforce your firm's reputation as a thought leader and trusted partner for financial advisors.

**Event Formats:**

- **Half-Day/Full-Day Workshop:** Focused on intensive learning on a specific topic.
- **Conference:** Offers several content tracks, keynote speakers, networking sessions, and an exhibition space (if desired).





## PROMPT:

You are a top level sales and marketing consultant known for doing very thorough qualitative research and analysis of opportunities for investment groups. The audience for our conversation today is for lead investors and new property management coming onboard. I'm a marketing director who has recently been hired to open a new hotel in Dallas Texas. The hotel will be called the Lukas Hotel and will be located in the design district just on the outskirts of downtown Dallas and located next to the Virgin hotel. The hotel will be a lifestyle luxury property and will be opened as an independent hotel and will not have a brand affiliation association with it. Much of the business generated by the Virgin revolves around the businesses in the design district along with the Dallas world trade center which is located across the street. The hotel will have 200 rooms and approximately 20,000 square feet of flexible meeting space. The space will be focused on corporate meetings as well as the social markets. We are currently 1 year away from opening so I need to create a marketing outline and plan. Provide a critical path that will encompass everything from creating the marketing plan to when I should be hiring staff. Please use the Virgin as an example as well as other similar hotels from around the U.S. Our style, voice, and vibe is very modern, ultra luxury, yet approachable. Our other properties are very exclusive and attract a savvy and well traveled guest who can identify and appreciate the fine touches. Create an entire marketing plan/executive summary.

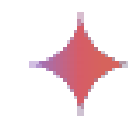
 PROMPT:



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Show drafts



**Executive Summary: John Hancock Presents: Navigate the Future: AI and Financial Leadership**



**Executive Summary**

**The Opportunity:** Senior financial executives are facing a tidal wave of Artificial Intelligence (AI) solutions. While they understand the potential, many lack the knowledge and clear path to navigate this new landscape. This conference positions John Hancock as a thought leader, providing these executives with the tools and insights to confidently utilize AI and lead their teams towards success.

**The Event:** John Hancock presents "Navigate the Future: AI and Financial Leadership," a two-day immersive learning experience designed for senior financial executives. Inspired by TED Talks, the event will feature industry experts, interactive workshops, and peer-to-peer networking, all delivered with the engaging voice and style of John Hancock.

**Impact on Our Brand:** This conference fosters brand loyalty and trust. By providing high-value content and positioning John Hancock as a knowledgeable guide in the AI revolution, we attract and retain top clients. Additionally, media coverage and attendee testimonials generate positive brand recognition within the financial community.




 PROMPT:

**Conference Details**

**Title:** Navigate the Future: AI and Financial Leadership

**Title  
Conference**

**Description:** Join John Hancock for an immersive learning experience designed to equip senior financial executives with the knowledge and strategies to leverage the power of AI. Through dynamic presentations, interactive workshops, and peer-to-peer networking, you'll gain insights into the latest AI trends, explore best practices, and discover practical applications for your organization.

**Call to Action:** Take the lead in the future of finance. Secure your spot at Navigate the Future today! (link to registration)

**CTA**

**Sample Agenda (Each Day Features 6 Breakout Options)**
**Day 1**

**Keynote:** The AI Revolution in Finance: A Paradigm Shift - Presented by a renowned AI thought leader.

**Keynote**

- **Description:** Explore the transformative impact of AI on the financial industry, from risk management and fraud detection to wealth management and personalized client experiences.

**Description**

- **Learning Outcome:** Gain a comprehensive understanding of AI's potential to disrupt and redefine financial services.

**Learning  
Outcomes**


 PROMPT:

**Breakout Sessions:**

1. Demystifying AI: A Primer for Financial Leaders - Understand core AI concepts and explore relevant applications for your organization.
2. AI for Enhanced Risk Management - Discover how AI is revolutionizing risk assessment, fraud detection, and regulatory compliance.
3. The Future of Wealth Management with AI - Explore AI-powered tools for personalized client experiences, portfolio optimization, and investment strategies.
4. Harnessing AI for Data-Driven Decision Making - Learn how AI can analyze vast datasets to generate actionable insights and improve strategic decision-making.
5. Building an AI-Ready Workforce - Develop strategies for upskilling your team and cultivating an AI-centric work environment.
6. The Ethical Considerations of AI in Finance - Explore responsible AI implementation to ensure fairness, transparency, and trust.

← Breakouts

**Day 2**

**Keynote:** Human + Machine: Leading Through the Age of AI - A fireside chat with a successful CEO who has embraced AI within their organization.

- Description: Gain insights into leadership strategies for navigating the transition to an AI-powered workplace.
- Learning Outcome: Develop a framework for leading and inspiring your team in the evolving landscape of AI.

← Day 2



 PROMPT:**Afternoon:**

- **Interactive Panel Discussion:** Industry leaders engage in a lively discussion about leveraging AI for success.
- **Networking Reception:** Connect with peers and foster valuable relationships.

**TED-Style Talks:** Throughout the day, inspirational short talks from industry experts and John Hancock innovators will offer diverse perspectives and spark further discussion.

**Additional Elements:**

- **Dedicated "Ask the Expert" Zone:** Get one-on-one guidance from AI specialists.
- **Interactive Technology Showcase:** Explore the latest AI solutions relevant to the financial sector.

By attending this event, senior executives will leave with a deeper understanding of AI, practical strategies for implementation, and the confidence to lead their teams towards a successful future.

**DANG!  
Bonus  
Stuffs  
We Never  
Asked for!**



**It's like this  
Thing knows  
Us? HmMMM**

 PROMPT:

# W elcome A cknowledge G uide. PRO TIPS

- ◆ *That was great.*
- ◆ *I know you can do better than that, please do this again,*
- ◆ *Pretend to be a \_\_\_\_\_*
- ◆ *Write to a different audience*
- ◆ *Take your time, Go step by step, Take a new perspective*
- ◆ *Sound less generative AI, Sound more human, like a friend*
- ◆ *That's great, give me 5 more*
- ◆ **Instruct ME** - How should I prompt you better?
- ◆ **Reverse Engineer**...did this accomplish my goal?
- ◆ *What am I not thinking about, how can I make this better?*



# Maritz Approach to AI



# Enterprise Perspective

- Formalized an AI advisory team led by technology and legal to accelerate and assess AI's role in our business
- Expedited use cases and proof of concept projects to expand learning and optimize processes
- Developed AI policies as a framework to guide the use of AI tools and upskill workers





# Use Cases

All Employee  
Tools & Usage

Contact Center  
Support

Proposal  
Development

Finance and  
Event Accounting

Event Management  
Collaboration

Resource  
Management



# GenAI Solution Key Elements

1

**Data**

2

**Assistant**  
(Large Language Model)

3

**Prompt  
Engineering**

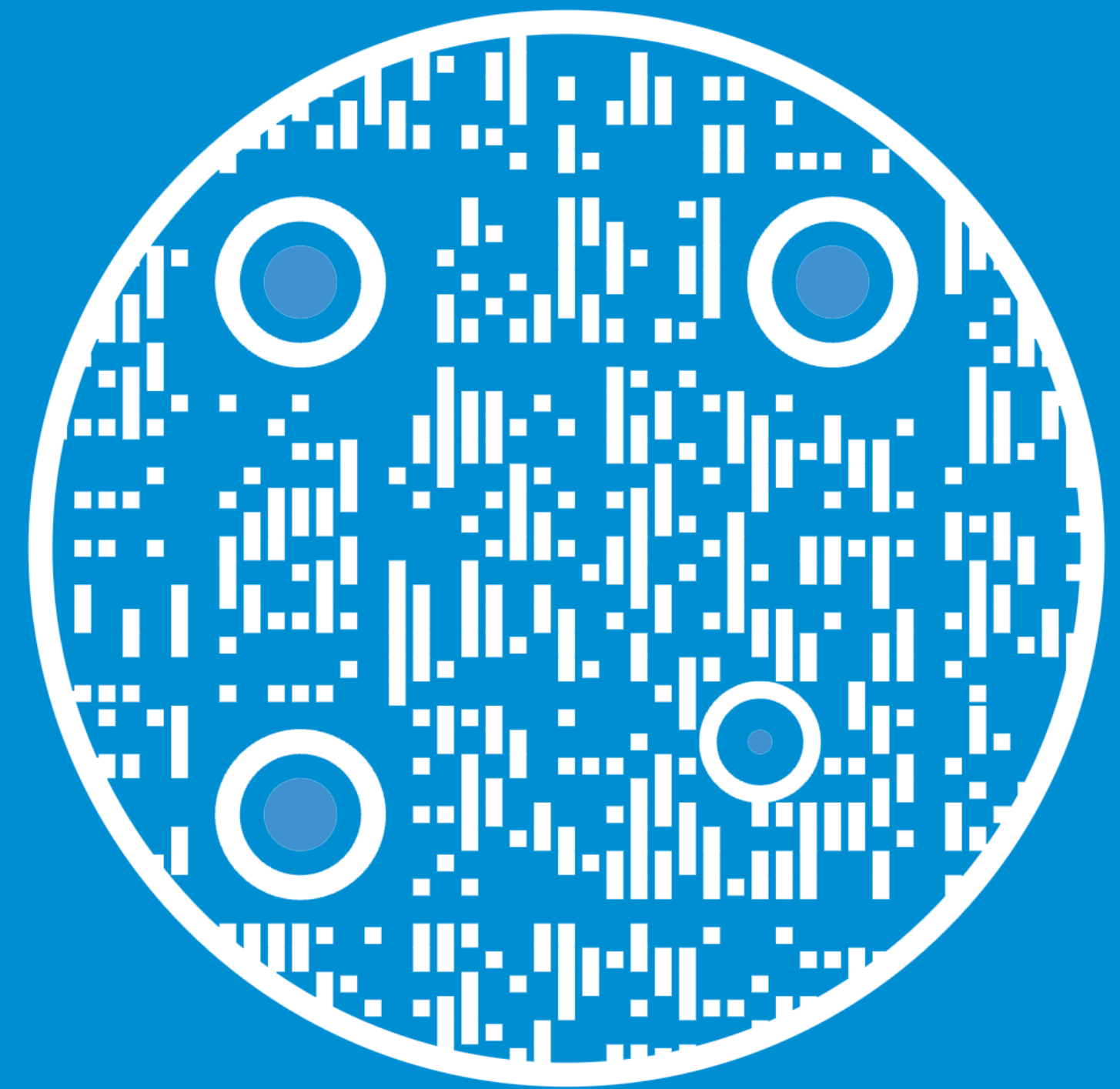
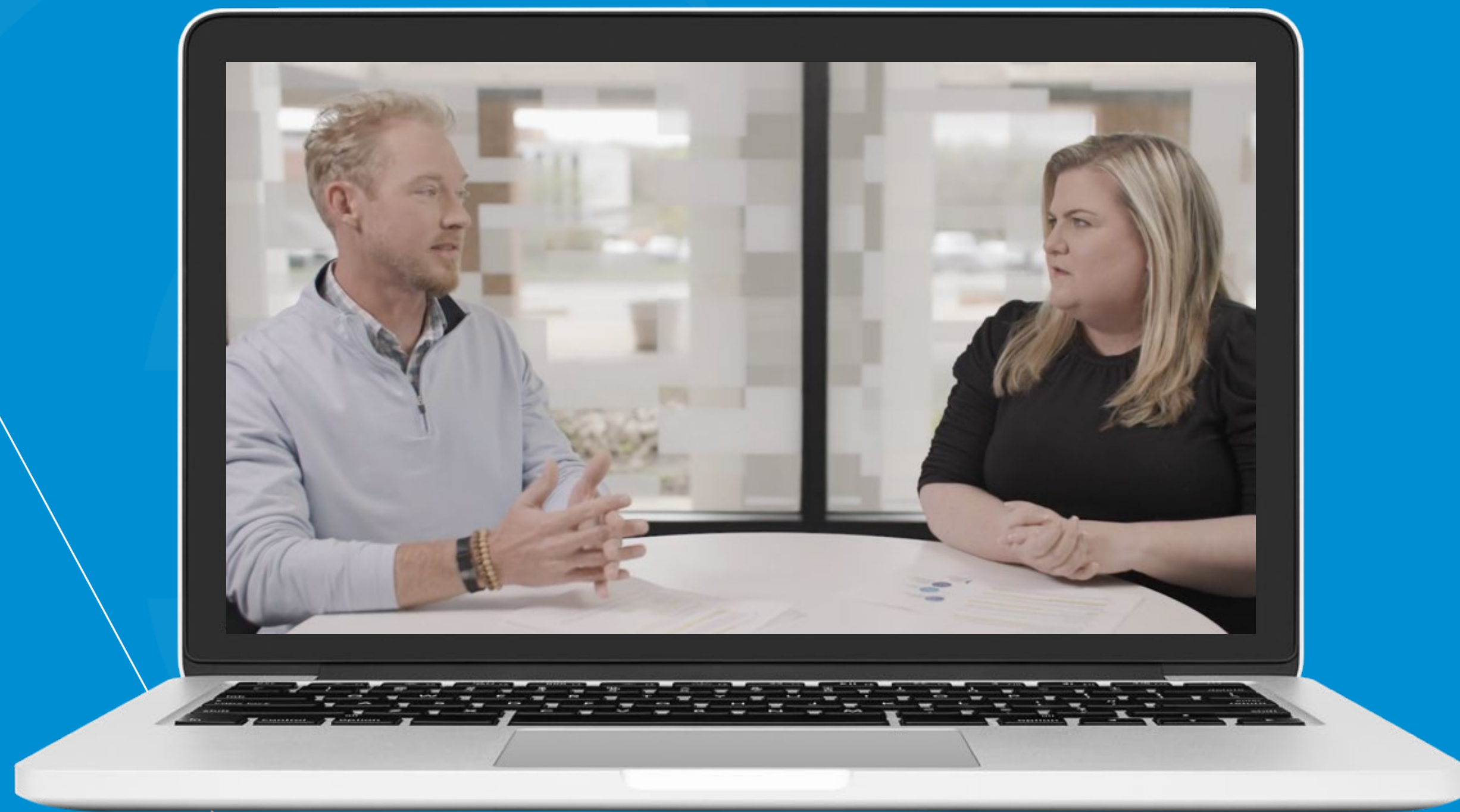
4

**Risk  
Mitigation**





# How We Are Approaching AI



# Q & A

