



AGENTS OF CHANGE · OCT 2026

WALK INTO THE ROOM KNOWING EVERYONE

AI-powered event prep.

WHERE THIS HOUR ENDS UP.



Sally Berry
Tourism Director
Great Lakes USA

II · Known

Critical

CONTEXT

Tourism Director, Great Lakes USA and Cruise the Great Lakes. Writes to Janette after sessions - most recently the day after the April 7 webinar. Agents of Change: attended 3 sessions, registered for 5.

WHY MEET

Thank her on the call; ask afterward what she has built since the spring.

KEY SIGNAL WALKING IN

Her words, April 8: "How I would have loved to have this information last year when I was doing RFPs for our rep firms!"

One real card from this webinar's registrant list, shared with her permission.

YOUR IMEX TUESDAY

TIME	PLANNER	COMPANY	MET
9:00	Ellen Ruiz	Meridian Incentives	
9:15	Dana Whitfield	Corvid Events	●
9:30	Sam Okafor	Brightline Meetings	
9:45	Lena Hart	Atlas Association Group	
10:00	Jon Mercer	Keystone Sales Summits	
10:15	Marcus Donnelly	Hartwell & Pierce Consulting	●
10:30	Ivy Chen	Northgate Pharma Events	
10:45	Rob Talley	Summit Peak Incentives	
11:00	Priya Shah	Lantern Association Partners	●

9 of 30 appointments · demo schedule, fictional planners



**BY FRIDAY YOU CAN'T
REMEMBER WHO SAID
WHAT.**



USE THIS TIME TO CONNECT.

*Fifteen minutes in the chair, thirty
times a show.*

60%

OF A SELLER'S WEEK GOES TO NON-SELLING WORK.

Manual data entry alone takes 13% of the week.

Salesforce, State of Sales, 7th edition. 4,050 sales professionals in 22 countries, surveyed August–September 2025.



**AI DOES THE PART OF THE WEEK YOU
DON'T WANT TO DO.**

Your job is the fifteen minutes in the chair.

IT CAN'T REMEMBER WHAT YOU NEVER WROTE DOWN.

You

**Brief me on Marcus Donnelly,
Director of Events at
Hartwell & Pierce Consulting,
before my 10:15 at IMEX.**

Answer · web search only

Marcus Donnelly

Director of Events, Hartwell & Pierce
Consulting

Corporate leadership meetings, 200-500
attendees

In the news

Firm announced a new Midwest office
(spring)

Posted about walkable host cities

Last time we talked

Demo — fictional planner and company.



**RECORD THE
MEETING.**



TWO WAYS TO CAPTURE.

GRANOLA

On your laptop. Video calls and meetings at your desk.

PLAUD NOTEPIN

On your lapel. Appointments, the hallway, dinner.

Both hand you a transcript. Both connect to Claude.

GRANOLA TAKES THE NOTES.

NO BOT JOINS

It runs on your laptop and listens to Zoom, Teams or Meet.

NOTES PLUS TRANSCRIPT

Jot a few words. It writes the meeting up around them.

TALKS TO YOUR AI

Connect it once and Claude or ChatGPT can read every meeting.

TRANSCRIPTS: \$14 A MONTH

Free: your AI sees 30 days of notes.
Business: full history and transcripts.

WHAT TO RECORD WITH

YOUR PHONE

- Voice memo on the table, then drop the file into your assistant.
- Free, and it works in a noisy hall.

A MEETING APP

- Sign in with your work email.
- It pulls the attendee list off the calendar invite, so the names are already right.

A DEDICATED RECORDER

- Better audio across a table.
- You can relabel who said what afterwards if it guessed wrong.

THREE SENTENCES THAT MAKE THE TRANSCRIPT USEFUL

ASK, AT THE START

- “I’ve got a recorder on the table so I get the follow-up right. Are you happy with that?”
- Then wait for the answer.

NAMES, AT THE START

- Say who is in the room and what they do.
- A transcript can only attribute what it heard someone say.

NEXT STEPS, AT THE END

- Say the commitments out loud before you stand up.
- Yours and theirs, each with a date.

CONNECT GRANOLA: SETTINGS → CONNECTORS

← Your connectors

 Granola

Disconnect

Connect Claude to your meeting history. Ask questions about your work and use your conversation context to get things done.

Prompt suggestions

Build my decision log ↗

Check today's action items ↗

Recap my last meeting ↗

Tool permissions

Choose when Claude is allowed to use these tools. You'll only see tools your organization has given you access to.

▼ Read-only tools 6

Always allow ▼

Get account info	☒	☒	☐
Read meeting transcript	☒	☒	☐
Read meetings	☒	☒	☐
List meeting folders	☒	☒	☐
List meetings	☒	☒	☐
Query meetings	☒	☒	☐

YOUR TRANSCRIPTS FILL IN THE BLANK

You

**What did I discuss
with Marcus Donnelly
last time, and what
did I promise him?**

Answer · from Granola

Jun 26 · site-selection call

420-person leadership conference, Nov 12-15.

Shortlist: Riverton, Lake Alder, Beige County.

You promised

The request list, same day.

A first proposal within five business days.

An intro to a DMC and a transport vendor.

Demo — fictional planner and company.

PICK YOUR PATH

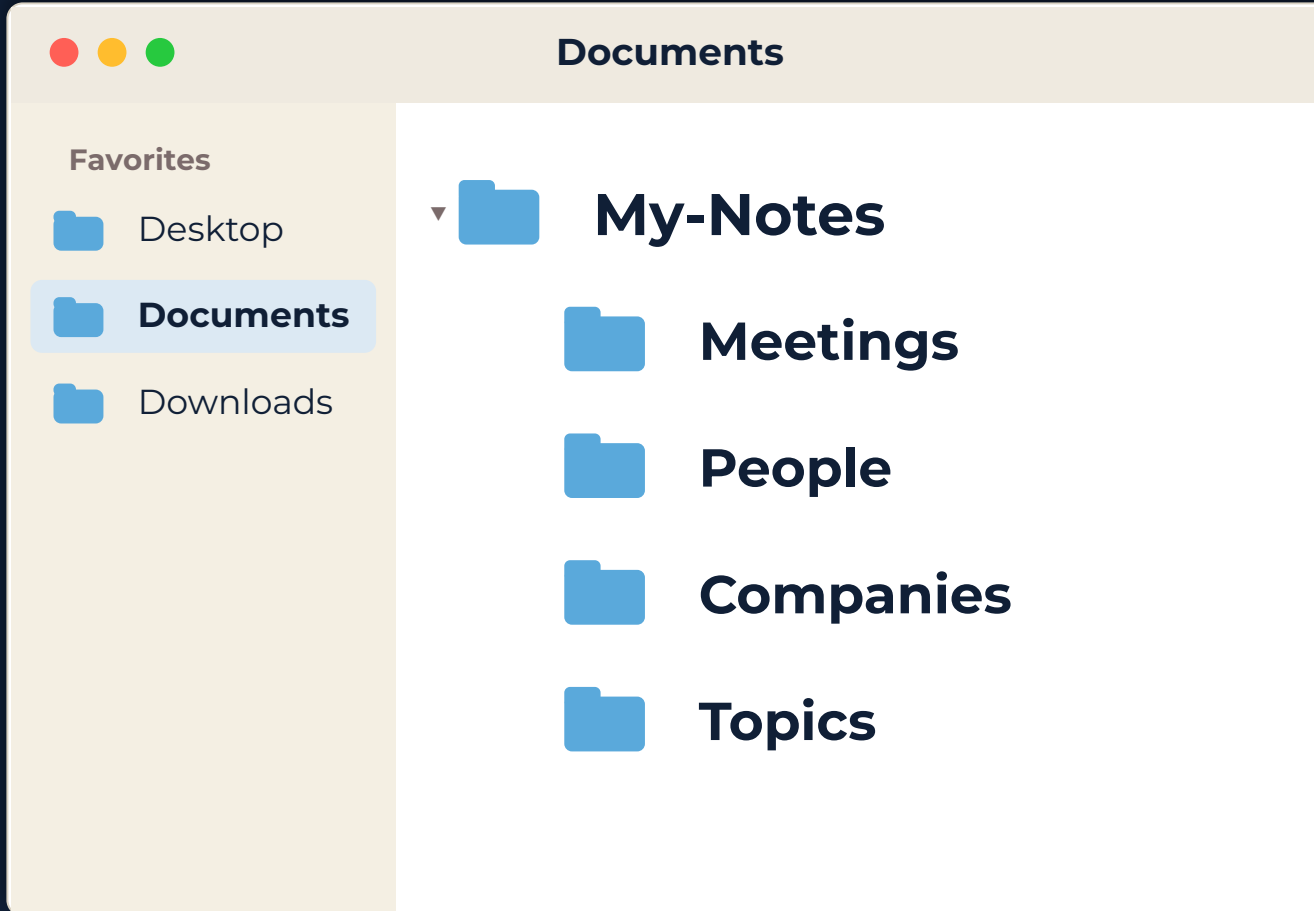
STEP	CLAUDE	CHATGPT	COPILOT ONLY	NO CONNECTOR
Read your meetings	Granola connector	Granola connector (paid plan)	Paste the transcript in	Paste the transcript in
Write the files	Cowork, in the desktop app	Work, in the desktop app	A OneNote notebook	Save each file yourself
Read your email	Outlook or Gmail connector	Outlook or Gmail connector	Built in	Paste the last thread
Read your CRM	CRM connector	CRM connector, if offered	Export a report	Export a report

Copilot can reach Granola through Copilot Studio. That one is a conversation with IT.



**CREATE A
CONNECTED WEB
OF YOUR
CONTACTS.**

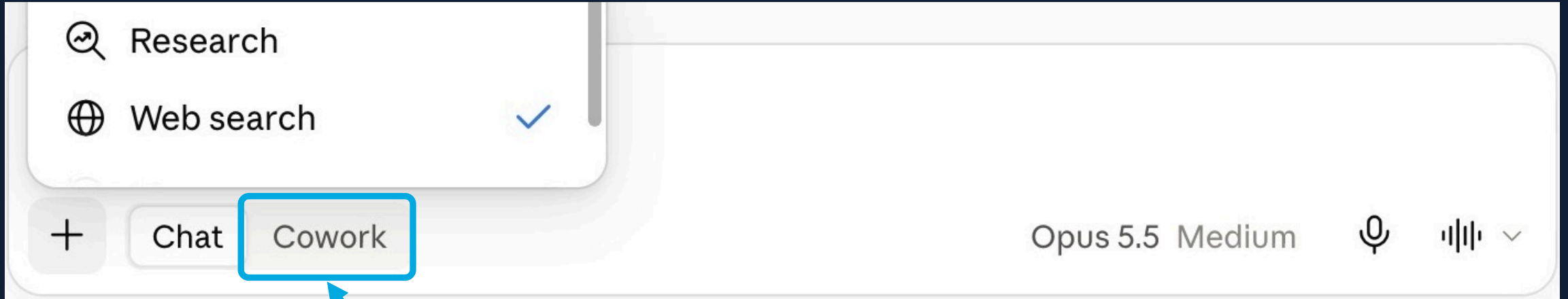
MAKE A FOLDER CALLED MY-NOTES.



Make it yourself, or ask Claude to:

“Create a folder called My-Notes in my Documents folder, with four folders inside: Meetings, People, Companies, Topics.”

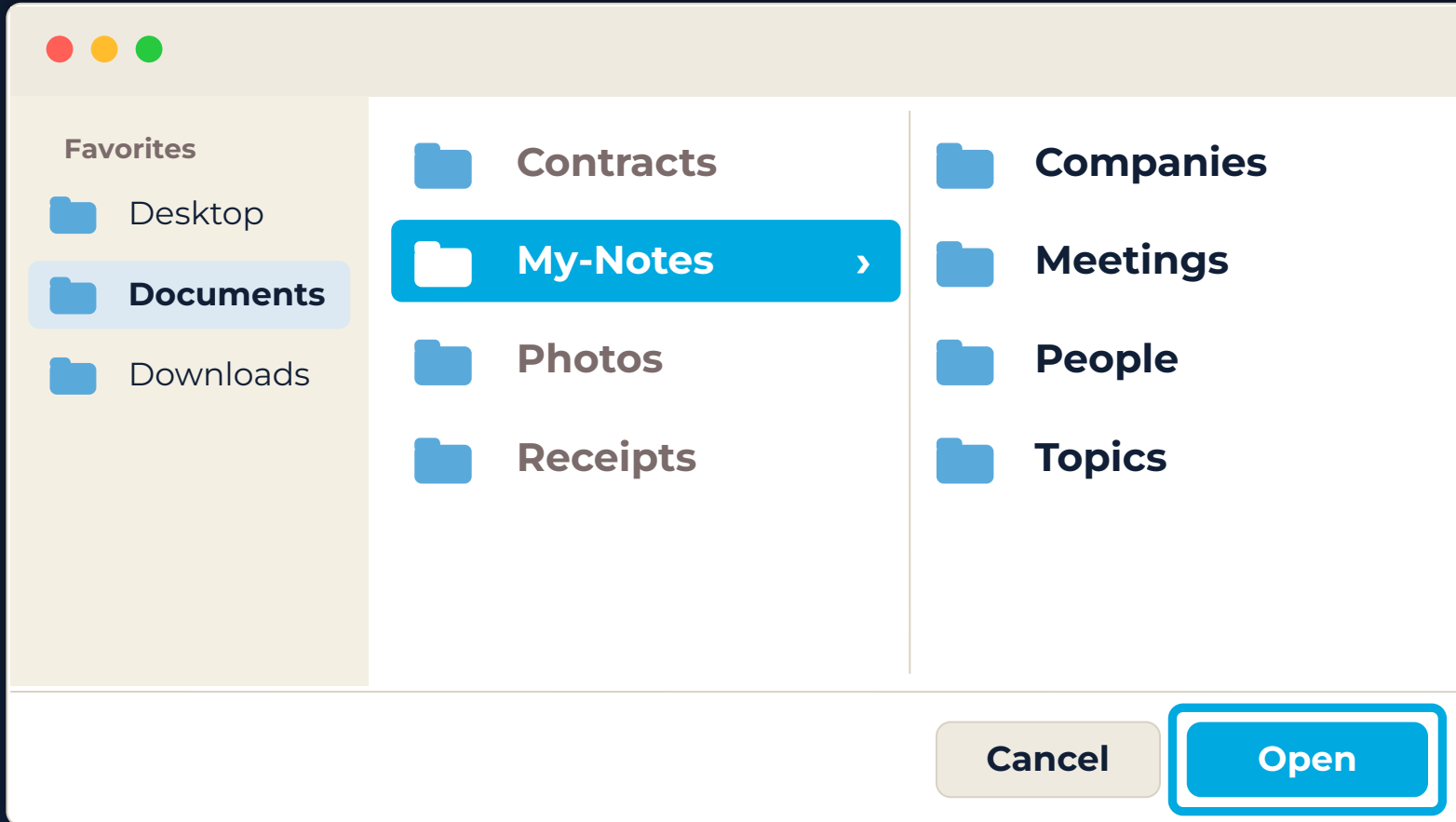
IN CLAUDE, CLICK COWORK.



Cowork can open, write and save files on your computer.

Next, it asks which folder to work in.

CHOOSE MY-NOTES.

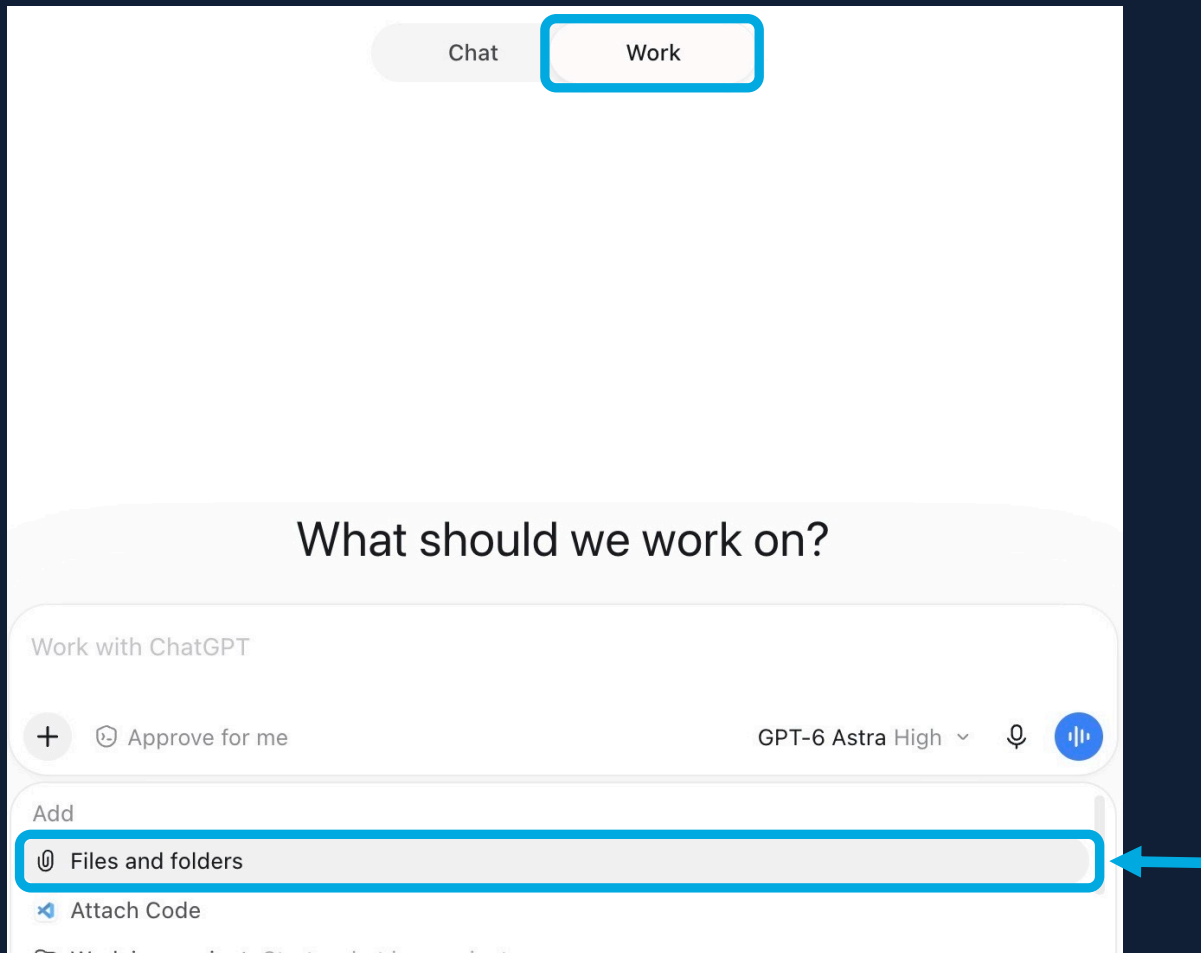


**Select My-Notes,
then Open.**

*Claude works inside
that folder, and only
that folder.*

Illustration

IN CHATGPT, CLICK FILES AND FOLDERS.



Switch to Work, open the + menu, then choose My-Notes.

Same folder, same filing prompt.

WHAT GOES IN EACH FOLDER

MEETINGS

One note per call: who was there, what they asked for, what you promised.

2026-06-26_Hartwell-Pierce.md

PEOPLE

One file per person: every meeting with them and how they like to work.

Marcus-Donnelly.md

COMPANIES

One page per organization: who works there and what's in play.

Hartwell-Pierce.md

TOPICS

One hub per theme: every call where it came up.

Walkable-Districts.md

Every name becomes a link: `[[Marcus-Donnelly]]` opens his file.

MY-NOTES, FILLED IN



Granola supplies the transcript. Claude files the note and links every name like `[[this]]`, and each file links back.

THE FILING PROMPT

WHAT YOU GIVE IT

“Today's Granola meetings.”

WHAT YOU WANT

“One note per meeting, plus a file for every person, company and topic.”

THE FIELDS

“Who was there, what they asked for, what I promised, the next step.”

THE FORMAT

“Link every name like [[this]]. If the file exists, add to it.”

THE GUARDRAIL

“Work from the transcript, never the summary. Write TBD rather than guessing.”

Save it once. It becomes a skill you run every evening.

“PULL TODAY'S GRANOLA MEETINGS AND FILE THEM.”

You

**End of each show day.
One line.**

Filed · 6 meetings

```
✓ 2026-10-13_Corvid-Events.md
✓ 2026-10-13_Hartwell-Pierce.md
  updated People/Marcus-Donnelly.md
✦ new People/Ellen-Ruiz.md
✦ new Companies/Meridian-Incentives.md
  updated Topics/Room-Blocks.md
```

TBD: Ellen's decision date

EVERY NOTE LINKS THREE WAYS.

Hartwell-Pierce.md

people:

[[Marcus-Donnelly]]

[[Nina-Alvarez]]

companies:

[[Hartwell-Pierce]]

topics:

[[Convention-Sales]]

PEOPLE

Every person gets a profile that remembers your history together.

COMPANIES

Every organization gets a page: contacts, timeline, what's in play.

TOPICS

Every theme gets a hub that gathers every call about it.

EVERY PERSON CARRIES THEIR WHOLE HISTORY.

You

Open Marcus's file.

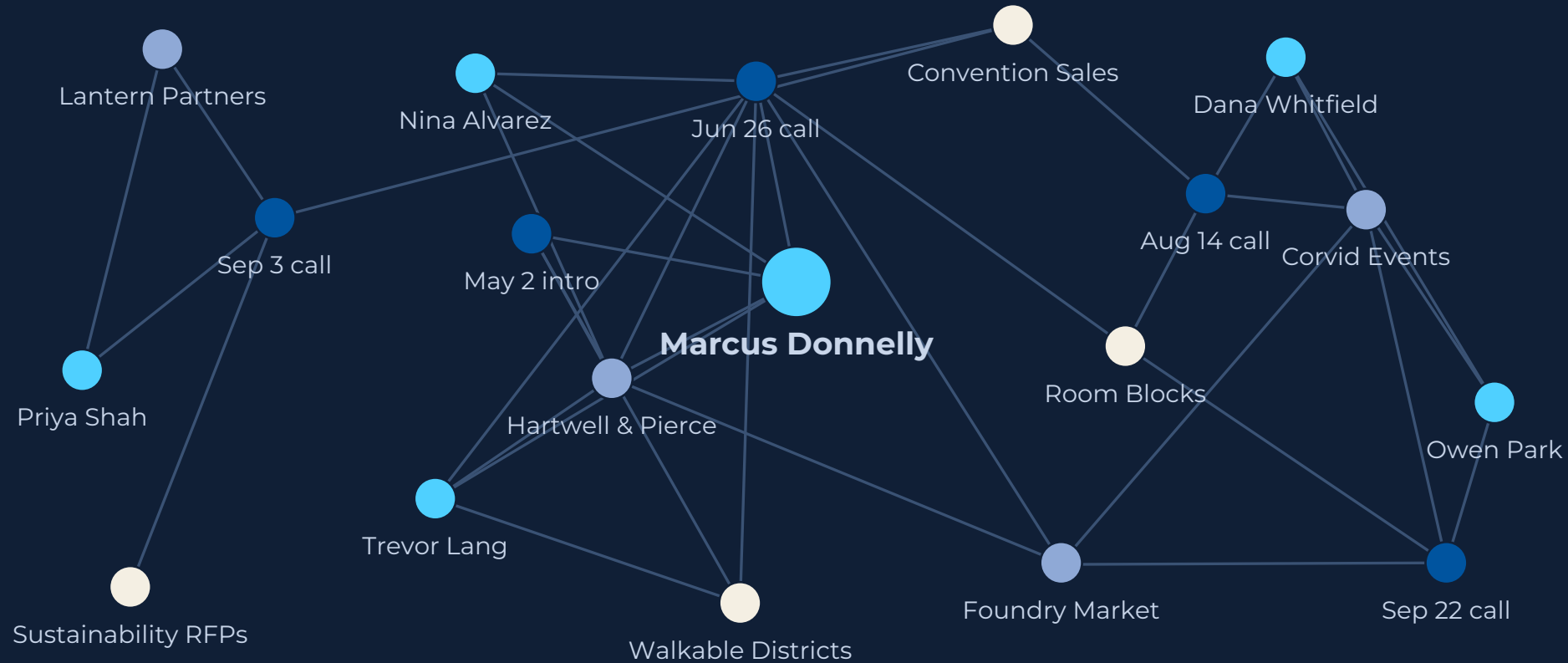
People / Marcus-Donnelly.md

```
role: Director of Events
company: [[Hartwell-Pierce]]

## Relationship History
2026-06-26 - site-selection call;
    leads the district-model proposal.
    You owe: the request list.
2026-05-02 - intro at ESTO; asked
    about walkable venues.
```

Demo — fictional planner and company.

YOUR MEMORY, CONNECTED



● People ● Companies ● Topics ● Meetings

Demo folder · fictional



**WALK IN
KNOWING
EVERYONE.**

PROMPT - BUILD THE FACE SHEET

WHAT YOU GIVE IT

“Here is my appointment list for IMEX.”

WHERE TO LOOK

“If connected: my CRM, email, calendar, call transcripts, and people and company files. Then the web.”

WHAT YOU WANT

“Build a face sheet: one card per person, as a single web page I can open on my phone.”

THE CARD

“Name, title, company, photo, and three lines: what I know, why meet, what to open with.”

THE SORT

“Group them: met recently, met before, my company knows them, new to me.”

THE PHOTOS

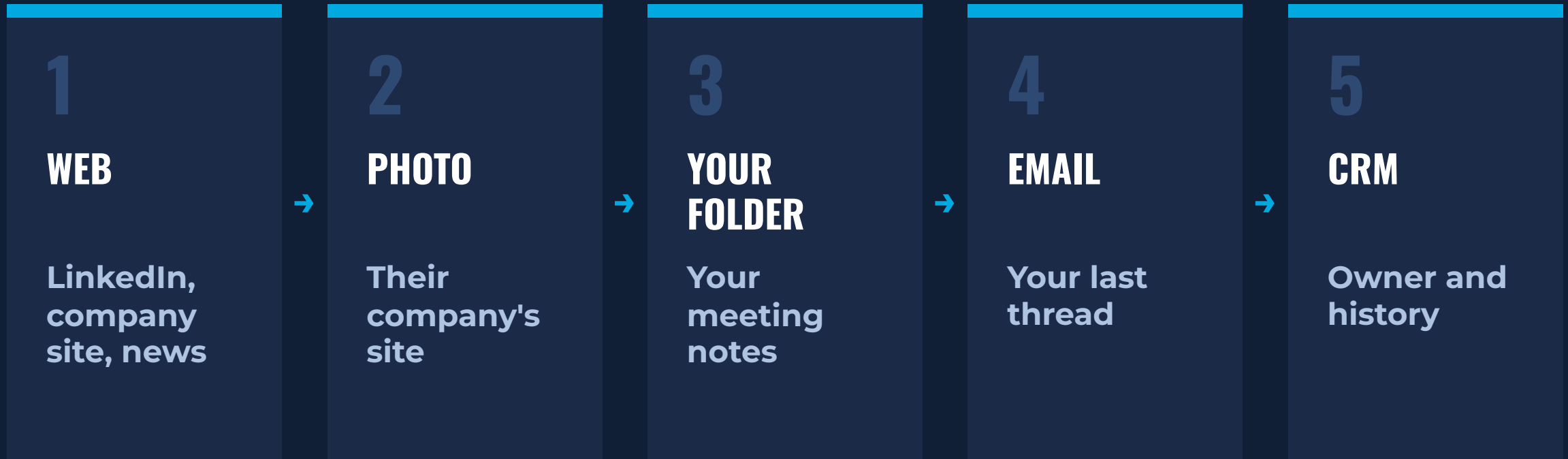
“Only from their own company’s website. If you can’t confirm it’s them, use initials.”

THE GUARDRAIL

“Say where each line came from. Never invent a relationship.”

Photograph this. Run it the night before the show, then check every card you plan to use.

FIVE PLACES TO LOOK, EASIEST FIRST



Each one fills in more of the card. Start with the web and add the rest as you connect them.

NO CRM CONNECTOR? EXPORT A REPORT.

THE REPORT

Contacts at every company on your appointment list.

FIVE COLUMNS

Name, company, last activity, open opportunities, owner.

THE FILE

Export to Excel or CSV. Attach it to the face-sheet prompt.

A SHORT LIST

Five appointments or fewer? Copy each record into the chat.

Check your company's AI policy before you upload CRM data.

CHECK EVERY FACE.

163

**registrants image search found a
photo for**

20

**photos I kept, from their own
organization or a travel-trade site**

Everyone else got initials. A wrong face is worse than no face.

This webinar's registrant list · Oct 6, 2026 · 165 people

THE FACE SHEET

USA TRAVEL WEEK — BUYER MEETINGS
Demo roster · illustrative only · 55 buyers

Search name, company, role...

All I · Warm II · Known III · Org-level IV · New Critical High

 Anders Vermeulen Commercial Director Delta Reizen · Antwerp	 Marit Ostberg Head of Product — North America Polaris Journeys · Stockholm	 Wren Kovacs Director of Purchasing Casa Verde Viaggi · Milan	 Teodor Novak Buyer, Americas Weltweit Reisen · Munich	 Kasper Moreau Head of Product — North America Fjordline Holidays · Oslo	 Clara Petrov Head of Partnerships Polaris Journeys · Stockholm	 Katrin Holmgren Commercial Director Fjordline Holidays · Oslo	 Freya Novak Product Manager, USA Clearwater Travel · Cardiff
 Ruth Haddad Head of Groups & Tailormade Nordstjerne Rejser · Copenhagen	 Simona Radu Managing Director Camino Largo · Madrid	 Gareth Bellandi Head of Partnerships Terra Nova Viagens · Lisbon	 Birgit Larsen Managing Director Voyages Atlantique · Bordeaux	 Luca Brennan Director of Purchasing Polaris Journeys · Stockholm	 Lena Ferrante Category Manager — Americas Weltweit Reisen · Munich	 Owen Salcedo Trade Marketing Manager Delta Reizen · Antwerp	 Priya Emrys Product Manager, USA Ponte Vecchio Travel · Florence

Demo · every face and name is fictional

TAP A FACE

USA
TRAVEL WEEK — BUYER MEETINGS
Demo roster · illustrative only · 55 buyers



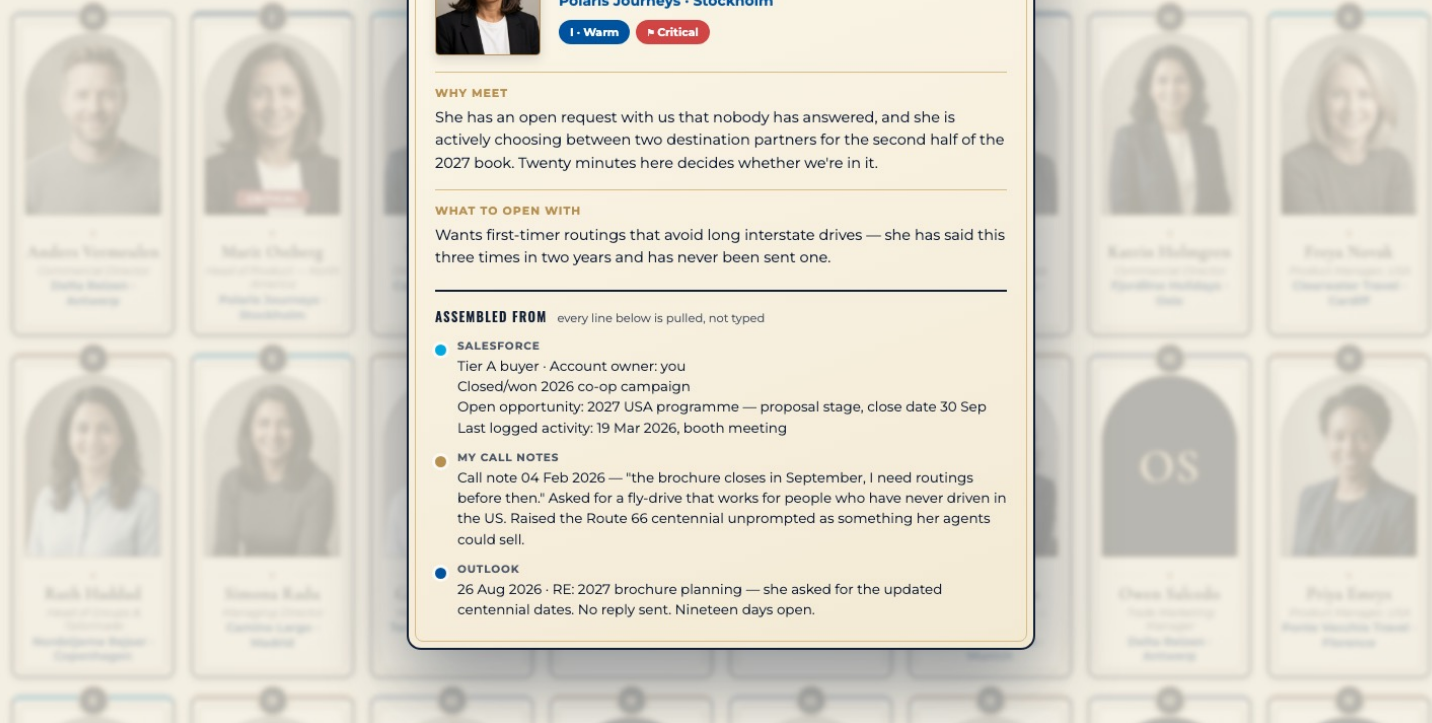
Marit Ostberg
Head of Product — North America
Polaris Journeys · Stockholm
1 - Warm 2 - Critical

WHY MEET
She has an open request with us that nobody has answered, and she is actively choosing between two destination partners for the second half of the 2027 book. Twenty minutes here decides whether we're in it.

WHAT TO OPEN WITH
Wants first-timer routings that avoid long interstate drives — she has said this three times in two years and has never been sent one.

ASSEMBLED FROM every line below is pulled, not typed

- SALESFORCE**
Tier A buyer · Account owner: you
Closed/won 2026 co-op campaign
Open opportunity: 2027 USA programme — proposal stage, close date 30 Sep
Last logged activity: 19 Mar 2026, booth meeting
- MY CALL NOTES**
Call note 04 Feb 2026 — "the brochure closes in September, I need routings before then." Asked for a fly-drive that works for people who have never driven in the US. Raised the Route 66 centennial unprompted as something her agents could sell.
- OUTLOOK**
26 Aug 2026 · RE: 2027 brochure planning — she asked for the updated centennial dates. No reply sent. Nineteen days open.



Demo · fictional buyer

SAME QUESTION. YOUR MEMORY BEHIND IT.

You

**Brief me on Marcus Donnelly,
Director of Events at
Hartwell & Pierce Consulting,
before my 10:15 at IMEX.**

Answer · your folder + web

Last time we talked — Jun 26

420-person leadership conference, Nov 12-15.

Shortlist: Riverton, Lake Alder, us.

You owe

Request list, promised same day (TBD sent)

Two-option proposal + decision matrix

Open with

DMC or transport vendor?

Foundry Market Wednesday is unheld.

Demo — fictional planner and company.

IT TELLS YOU WHAT IT DIDN'T KNOW.

- You owe: the request list, promised June 26.
- Still open: a DMC or a transport and events vendor?
- TBD: whether the request list ever went out.

THIS WEBINAR.

6

I know you
(according to Claude. But I actually
know 27 of you!)

128

Brand USA knows you

33

New to all of us

65 of you have registered for one of these before.

Registrants as of Oct 9, 2026 · 167 partners, agency staff excluded · Salesforce, Outlook and my notes



**PUT IT IN
YOUR POCKET.**

THREE WAYS TO OPEN IT

ON YOUR LAPTOP

Save it as one HTML file. Double-click to open.

IN THE CLAUDE APP

Claude builds it as an artifact. Open the chat on your phone.

AS A WEB APP

Deploy it to Vercel. Save it to your home screen.

CHATGPT OR COPILOT

Ask for one HTML file, or a Word doc in OneDrive.

A Vercel link opens for anyone who has it. Keep email and CRM notes off public pages.



**THIS WEEK'S
FOLLOW-UP IS THE
PREP FOR THE
NEXT EVENT.**

BUY THE PAID ACCOUNT.

- A free account trains on whatever your team types in.
- About twenty dollars a month, per person.
- The major tools are within twenty percent of each other.

The difference is the harness around the model.

PHOTOGRAPH THIS

WHAT FOR	THE PROMPT
Make the folders	"Create a folder called My-Notes in my Documents folder. Inside it, make four folders: Meetings, People, Companies, Topics."
File the day	"Pull today's Granola meetings and file them: one note per meeting, a file for every person, company and topic. Link every name. Transcript, never the summary. TBD rather than guessing."
Ask one question	"What did I discuss with Marcus Donnelly last time, and what did I promise him?"
Brief one person	"Brief me for this meeting: their priorities, three things in the news in thirty days, one thing that proves I did my homework."
Build the face sheet	"Here is my appointment list. Build a face sheet: one card per person with name, title, company, photo, what I know, why meet, what to open with. Photos only from their company's site, initials otherwise. Say where each line came from."



FILE ONE MEETING TODAY.

*Run the cold brief on your IMEX list
tonight. The folder starts with your
next call.*

NEXT WEBINAR

YOUR VIRTUAL ADVISORY BOARD

Expert feedback before the stakes are real.

Monday, November 2 • 1:00 PM ET



**A RECORDING OF THIS WEBINAR WILL BE
AVAILABLE.**

thebrandusa.com/insights-resources/ai-innovation



Thank you.

Janette Roush · jroush@thebrandusa.com · [linkedin.com/in/janetteroush](https://www.linkedin.com/in/janetteroush)

BRAND
USA