

Clear Skies.

AI 102:
Building on the Fundamentals



WELCOME to Clear Skies

Your Hosts:



Caroline Clark



Jim Hake

Welcome Back



Last session recap

We learned AI is everywhere, and everyone's secretly using it to write emails.

Have you tried having it polish your emails yet?



POP QUIZ

What do you think is the most commonly used AI platform?

There are so many out there, what do you think is the most popular one?



Is it real????

A quick game to see if you can tell the real AI platforms from the fake.

Claude	REAL
Perplexity	REAL
TaskGoblin AI	FAKE
GrammarlyGO	REAL
VisionForgeX	FAKE
Otter.ai	REAL

At this point AI startup names are generated by spinning a wheel full of random nouns.



Poll

What have you used AI for since the last Clear Skies?



Summarize a meeting



Rewrite an email



Brainstorm ideas



Analyze a spreadsheet



Draft social content



During our first session, we focused on understanding what AI is and why it matters.

Today we're shifting into the practical side:
How businesses are actually using AI, where it's helping, where it still struggles,
and how organizations can start building smarter workflows around it.

At this point I'd like to hand things over to my Vanna White, Jim.

Yes, you, Jim.

AI to Plan a Trip

An Excellent Beginner's Step into AI



Prompting:

The more context you give upfront, the less back-and-forth you need. A great first prompt is less like a Google search and more like briefing a really smart travel agent.

- Hard Logistics First
 - Star and End Point
 - Exact dates
- State Your Interests Specifically
 - Don't just say "*fun things*." The more specific, the better
- State Your Preferences AND Your Reasoning
 - When the AI understands the why, it can make smarter judgment calls throughout the entire planning process — not just follow a rule blindly.
- Define Your Tolerances
 - Help the AI understand your limits and flexibility. This turns vague preferences into something the AI can actually calculate with.
- Invite the AI to Ask Questions
- Define the Geographic Scope

AI to Plan a Trip



Weak Prompt: "Plan a road trip for me"

Strong Prompt: << Let's take a look at Hatz.ai >>

AI to Plan a Trip



Tips for Using AI to Plan Trips:

- It's a Conversation, Not a Search Engine
- It Combines Research AND Planning in One Place
- Be willing to push back
- Give your reasoning, not just your preference
- Ask it to flag potential problems
- Ask for options, not just answers
- Use it to stress-test your own plan
- Ask follow-up questions freely

AI to Plan a Trip



Trip Planning Adjacent:

- Car Prep Checklist
- To-Do List
- Fuel Planning
- Budget Planning
- Money-Saving Tips Specific to Your Trip
- Contingency Planning (Rainy day backups)
- Road Trip Playlist / Podcast Strategy
- Customized Packing Lists
- Apps to Download Before You Leave
- Home Prep Checklist



Using AI to Help with Spreadsheets

What I already Had:

	A	B	C	D	E
1	Day	Date	Position	Employee	Whereabouts
24	Friday	5/8/2026	Lead	Zack	In Office/Remote
25	Friday	5/8/2026	Tech	Jean	In Office
26	Friday	5/8/2026	Tech	Seth	In Office
27	Friday	5/8/2026	Tech	Joey	In Office
28	Friday	5/8/2026	Tech	Rodrigo	Remote
29	Friday	5/8/2026	Tech	Lanea	Remote
30	Friday	5/8/2026	Tech	Gianna	Remote
31	Friday	5/8/2026	Escalation	Tim	In Office
32	Friday	5/8/2026	Escalation	Max	In Office
33	Saturday	5/9/26 - 5/10/26	Tech	Seth	
34	Saturday	5/9/26 - 5/10/26	Escalation	Rob	

Why Use AI?

- You have something that works, but you need it to work better.
- Turn hard coded values into a formula

Starting Simple — Just Fix My Formula



The Ask

- Rotate 4 techs weekly using an index number (1–4)
- Each index = one tech in-office, three remote
- Needed a formula to pull the right assignment automatically

What AI Proposed

- XLOOKUP formula against a lookup table (LU tab)
- Index number drives In Office vs. Remote for each tech
- Formula placed directly into the schedule cells

The Snag

- Data Validation was blocking formula results
- Dropdown was a hardcoded list — rejected formula output
- Fix: changed validation source to a dynamic named range



I Changed My Mind — New Layout Needed

Before:

	A	B	C	D	E	F	G
1	Day	Date	Position	Employee	Whereabouts	Note	Index
24	Friday	5/8/2026	Lead	Zack	In Office/Remote		
25	Friday	5/8/2026	Tech	Jean	In Office		
26	Friday	5/8/2026	Tech	Seth	In Office		
27	Friday	5/8/2026	Tech	Joey	In Office		2
28	Friday	5/8/2026	Tech	Rodrigo	Remote		
29	Friday	5/8/2026	Tech	Lanea	Remote		
30	Friday	5/8/2026	Tech	Gianna	Remote		
31	Friday	5/8/2026	Escalation	Tim	In Office		
32	Friday	5/8/2026	Escalation	Max	In Office		
33	Saturday	5/9/26 - 5/10/26	Tech	Seth			
34	Saturday	5/9/26 - 5/10/26	Escalation	Rob			
35	Friday	5/15/2026	Lead	Zack	In Office/Remote		
36	Friday	5/15/2026	Tech	Jean	In Office		
37	Friday	5/15/2026	Tech	Seth	In Office		
38	Friday	5/15/2026	Tech	Lanea	In Office		3
39	Friday	5/15/2026	Tech	Rodrigo	Remote		
40	Friday	5/15/2026	Tech	Joey	Remote		
41	Friday	5/15/2026	Tech	Gianna	Remote		
42	Friday	5/15/2026	Escalation	Tim	In Office		
43	Friday	5/15/2026	Escalation	Max	In Office		
44	Saturday	5/16/26 - 5/17/26	Tech	Gianna			
45	Saturday	5/16/26 - 5/17/26	Escalation		0		
46	Friday	5/22/2026	Lead	Zack	In Office/Remote		
47	Friday	5/22/2026	Tech	Jean	In Office		
48	Friday	5/22/2026	Tech	Seth	In Office		
49	Friday	5/22/2026	Tech	Gianna	In Office		4
50	Friday	5/22/2026	Tech	Rodrigo	Remote		
51	Friday	5/22/2026	Tech	Joey	Remote		
52	Friday	5/22/2026	Tech	Lanea	Remote		
53	Friday	5/22/2026	Escalation	Tim	In Office		
54	Friday	5/22/2026	Escalation	Max	In Office		
55	Saturday	5/23/26 - 5/24/26	Tech		0		
56	Saturday	5/23/26 - 5/24/26	Escalation		0		



I Changed My Mind — New Layout Needed

After:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Legend:	In Office	Remote	OFF	Onsite	In Office/Remote							
2													
3	FRIDAY SCHEDULE												
4	Role	Name	Fri 4/24	Fri 5/1	Fri 5/8	Fri 5/15	Fri 5/22	Fri 5/29	Fri 6/5	Fri 6/12	Fri 6/19	Fri 6/26	Fri 7/3
5	Lead	Zack	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote
6	--- TECHS ---												
7	Tech	Gianna	OFF	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
8	Tech	Jean	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office
9	Tech	Joey	In Office	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
10	Tech	Lanea	Remote	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
11	Tech	Rodrigo	Remote	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
12	Tech	Seth	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office
13	--- ESCALATION ---												
14	Escalation	Tim	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office	In Office
15	Escalation	Max	In Office	In Office	In Office	In Office	In Office	In Office	OFF	OFF	In Office	In Office	In Office
16													
17	WEEKEND ON-CALL												
18	Role	Name	4/25 - 4/26	5/2 - 5/3	5/9 - 5/10	5/16 - 5/17	5/23 - 5/24	5/30 - 5/31	6/6 - 6/7	6/13 - 6/14	6/20 - 6/21	6/27 - 6/28	7/4 - 7/5
19	Tech	On-Call Tech	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
20	Escalation	Escalation	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?	#NAME?
21													
22	Rotation	Index #	—	1	2	3	4	1	2	3	4	1	2

When AI Gets It Wrong



Attempt 1

v4

Asked AI to make the Quick View tab formula-driven

AI referenced the Friday Remote tab — not what was wanted. Back to the drawing board.

Attempt 2

v5

Asked for a fully self-contained tab with no external references

Formulas written correctly in theory — but still not working in Excel.

Root Cause Found

v5b

AI inspected the raw data in the Weekend Schedule tab

Hidden time component (16:34:41) in dates prevented matches. Fix: wrapped both sides in INT().

This is the most important lesson. It took multiple attempts — and one bug required inspecting hidden data to find.

Knowing When to Do It Yourself



I Solved This One

Tech Rotation Formula

- Built my own INDEX/MATCH solution
- Created a new lookup table on the LU tab
- I knew my data better than AI did
- Sometimes the fastest path is doing it yourself

AI Solved This One

Weekend On-Call Date Mismatch

- AI spotted hidden timestamps in source data
- INT() wrapper stripped the time component
- Would have taken a long time to find manually
- AI's ability to inspect raw data paid off here

Built Together

Row 24 — Conflict Check Formula

- New idea: flag if on-call tech isn't set to Remote
- Described the logic, AI wrote the formula
- Uses INDEX/MATCH + IF/OR in one clean expression
- Works across all 11 week columns automatically

I knew my data better than AI did. The right move is to take what AI gives you and finish it yourself when needed

Final Results



	A	B	E	F	G	H	I	J	K
1	Legend:	In Office	Remote	OFF	Onsite	In Office/Remote			
2									
3	FRIDAY SCHEDULE					CWC Project Help			
4	Role	Name	Fri 5/8/26	Fri 5/15/26	Fri 5/22/26	Fri 5/29/26	Fri 6/5/26	Fri 6/12/26	Fri 6/19/26
5	Lead	Zack	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote	In Office/Remote
6	— TECHS —								
7	Tech	Gianna	Remote	Remote	In Office	In Office	Remote	Remote	In Office
8	Tech	Joey	In Office	Remote	Remote	In Office	Remote	Remote	Remote
9	Tech	Lanea	Remote	In Office	Remote	In Office	Remote	In Office	Remote
10	Tech	Rodrigo	Remote	Remote	Remote	In Office	In Office	Off	Remote
11	Tech	Jean	In Office	In Office	In Office	In Office	In Office	In Office	In Office
12	Tech	Seth	In Office	In Office	In Office	In Office	In Office	In Office	In Office
13	— ESCALATION —								
14	Escalation	Tim	OnSite	In Office	In Office	In Office	In Office	In Office	In Office
15	Escalation	Max	In Office	In Office	In Office	In Office	Off	Off	In Office
16									
17	WEEKEND ON-CALL								
18	Role	Dates	5/9 – 5/10	5/16 – 5/17	5/23 – 5/24	5/30 – 5/31	6/6 – 6/7	6/13 – 6/14	6/20 – 6/21
19	Tech	On-Call Tech	Seth	Gianna	Rodrigo	Lanea	0	Gianna	Lanea
20	Escalation	Escalation	Rob	Tim	Rob	Rob	Tim	0	0
21									
22	Rotation	Index #	2	3	4		1	3	4
23									
24			—	✓ OK	✓ OK	⚠ Fix Needed	—	✓ OK	✓ OK

Key Takeaways



Start broad, refine as you go

Each version got better based on feedback — the first answer is rarely the last.



AI isn't always right the first time

Formula failures led to a deeper understanding of the actual data structure.



AI is great at diagnosing problems

A hidden timestamp bug would have taken a long time to find manually.



Human expertise still matters

Knowing your own data is an advantage — use it when AI falls short.



The net result was worth it

A full layout redesign + multiple working formulas in a fraction of the time.

AI didn't build my spreadsheet for me — it collaborated with me to build something better than I would have built alone.

Real Life: Claude is confused



Claude my friend! I need a lossless markdown of this chat.

I love the enthusiasm, but I have to be straight with you — I'm not able to export or save a copy of this conversation as a file. That's a platform limitation, not something I can work around.

Your best options would be:

- Copy/paste the conversation manually into a document
- Use your browser's **Print → Save as PDF** function to capture the whole chat
- Check if **claude.ai** has any built-in export option in the conversation menu

That said, the good news is that all the key details — your itinerary, to-do list, BGW menus, and notes — are all saved in my memory and we can pick right back up anytime! 🥳

How come you were able to do this on another chat but not this one?

Hmmmm

You're right to call that out! I do have computer and file creation capabilities. Let me put that to work for you! 😊

Viewed a file, created a file, read a file >

There you go! Sorry for the initial brain freeze — everything is in there: full itinerary, carousels, parks, zoos, passes, to-do list, BGW dining guide, and all the notes. 🥳



POLL AND QUIZ RESULTS

What's On Your Mind?



Questions, comments, concerns?

Ongoing disputes with your office printer, or AI hallucinations?

Let's gab.



Thank You for Joining Us

AI is evolving fast — thank you for learning with us.