



CATALYSTMEET

SHEFALI BISHT

ABOUT ME

Shefali Bisht, Data Engineer



<https://www.linkedin.com/in/shefali-bisht/>



<https://www.shefalibisht.com>



shefalibisht00@gmail.com



Medium

<https://medium.com/@shefalibisht00>

PROJECT OVERVIEW

Business Use Case: In project management, managers spend most of their time in meetings and documenting those meetings. Project managers, team leads, and stakeholders gather regularly to discuss wins, risks, financials, milestones, and other crucial aspects. This is crucial for strategic planning, review progress, assess project advancement, address challenges, and recalibrate strategies as needed. However meeting notes and relevant documentation may be stored in siloed systems, limiting accessibility for team members and stakeholders. Traditional meeting management often leads to scattered notes, time-consuming follow-ups, and manual documentation.

Challenges:-

- **Information Dispersal:** The vast amount of data discussed in project governance meetings often leads to scattered notes across various platforms and devices.
- **Time-Consuming Follow-Ups:** Manual follow-ups and tracking of action items can be time-consuming and prone to oversight.
- **Manual Meeting Summaries:** Crafting meeting summaries manually is time-consuming and may lead to variations in the level of detail and clarity.
- **Inconsistencies in Monthly Reporting:** Manual processes often lead to inconsistencies in the format and structure of monthly reports, affecting the clarity of information presented.

SOLUTION: PROJECT OVERVIEW

- **Effortless Meeting Note Management:** Project managers use the Power App to create, update, and delete meeting notes seamlessly, fostering a centralized and organized repository of discussions.
- **Monthly Meetings Dashboard:** The app's dashboard categorizes discussions into wins, risks, financials, milestones, etc., providing an insightful overview of project progress and challenges.
- **AI-Enhanced Summaries:** AI Builder's generative AI capabilities automatically create concise and accurate summaries of each meeting, reducing manual effort and ensuring consistency.
- **Feedback Form Automation:** Project managers can easily generate responses to a feedback form using the AI capabilities, ensuring a quick and data-driven feedback loop.
- **PDF Reports for Documentation:** The AI-generated responses and feedback form details are compiled into PDF reports automatically. These reports are then sent as attachments to relevant stakeholders, ensuring a comprehensive and consistent record of each meeting.

TECH STACK

Service/Tool	Use	Benefits
Power App	The primary platform for creating the user interface and managing the frontend of the application.	<ul style="list-style-type: none">• Power Apps is a low-code platform, allowing for the rapid development of custom applications with minimal coding.• Tight integration with Microsoft 365 services, such as SharePoint and Power BI, facilitates seamless data connectivity and interoperability.• Power Apps comes with built-in security features, providing role-based access control and data encryption.
Power Automate	Used for workflow automation, particularly in generating PDFs from AI-generated forms.	<ul style="list-style-type: none">• Task Automation: Power Automate automates repetitive tasks, reducing manual effort.• Versatility: Adaptable to diverse business processes and scenarios.• Cross-Platform Connectivity: Works seamlessly across different applications and services.
AI Builder	Integrated for generative AI capabilities, enabling the creation of meeting summaries and automated form content.	<ul style="list-style-type: none">• Generative AI Capabilities• Integration with Power Platform• Accelerated Development• Scalability
Sharepoint List	Backend storage solution for managing and storing meeting logs, follow-ups, and other relevant information.	<ul style="list-style-type: none">• Centralized Data Management• Structured Information Storage• Collaboration and Accessibility• Integration with Microsoft Ecosystem

CATALYSTMEET – POWERED BY POWER PLATFORM

Project Management: Meetings Overview

Search items

Individual Meeting 2

- CRM Customer Support Daily Standup
12/12/2023 7:04 PM
- Security Incident Response Planning
12/18/2023 7:09 PM

Group Meeting 1

- IT Project Roadmap Review
12/16/2023 7:09 PM

Project Meeting 3

- Customer iOS App Release Milestones
12/16/2023 7:46 PM
- Monthly Marketing Metrics Review
12/16/2023 7:09 PM
- Project Juggernaut Risk Review
12/16/2023 7:09 PM

Presentation 2

- Q4 Sales Presentation
12/16/2023 7:46 PM
- Water Conservation Product Launch Presentation
12/13/2023 7:46 PM

Monthly Form Reset

Key Themes

Start Date: 11/1/2023 End Date: 12/24/2023

Filter by Creator

- Bisht, Shefali
- Smith, Sam
- Bezos, Elon
- Musk, Jeff
- Gates, Donald

Apply Clear

Main Screen: Allows users to view, filter, and add new meetings.

CATALYSTMEET





Project Management: Meetings Detail

← 🗑️ ✎️

IT Project Roadmap Review

Milestones Project **Group Meeting** 12/16/2023 7:09 PM

Attendees Email

-  Jim Halpert
Technology Services - Strategic Email
-  Dwight Schrute
Technology Services Email
-  Michael Scott
Technology Services Email
-  Pam Halpert
Technology Services - Strategic Email

Meeting Synopsis

Successful rollout of Office 365 migration last month with minimal disruption only ~30 help desk calls. Users now adapted and utilization looks good based on analytics. Cloud infrastructure upgrade also went smoothly after extensive load testing, no issues handling 4X volume spikes. Coming up next focusing on network upgrade and Phase 2 of O365 for SharePoint/Teams, timeline on track.

Follow-Up

No Follow-up

No follow-up required Send Follow-Up Email Email

Attachments

Verticals

None

Groups Represented

Microsoft

Projects

None

Vendor

None

Key Themes

- Application Development
- Project Status
- SharePoint

Meeting Detail Screen: Allows users to view meeting in detail. Users can edit the meeting, send follow-up, or create an AI generated meeting summary and send that as an email.

CATALYSTMEET

Send Email to Participants

IT Project Roadmap Review Send

Recipients (4)

Search People

Search for users in your org

Subject

IT Project Roadmap Review

Generate meeting email with AI

Content generated by AI may include inaccuracies and biases. Prior to sending an email, a human review is necessary. Human oversight serves to not only detect potential errors and biases but also ensures that the content is suitable for the intended purpose and aligns with the company's values.

Generate

Message

Subject: IT Project Roadmap Review Meeting - December 16, 2023

Dear Team,

I hope this email finds you well. I would like to inform you about an upcoming meeting to review the IT Project Roadmap. Please find the details below:

1. Meeting Title: IT Project Roadmap Review
2. Date & Time: December 16, 2023, at 7:09 PM
3. Attendees: Jim Halpert, Dwight Schrute, Michael Scott, Pam Halpert
4. Agenda:
 - Successful rollout of Office 365 migration last month with minimal disruption. We received only around 30 help desk calls. Users have now adapted to the new system, and utilization looks good based on analytics.
 - Cloud infrastructure upgrade went smoothly after extensive load testing. There were no issues in handling 4X volume spikes.
 - Next steps: Focusing on network upgrade and Phase 2 of O365 for SharePoint/Teams. The timeline is on track.

Please come prepared to discuss any challenges or roadblocks you may have encountered during the implementation. Additionally, if you have any updates or reports to share, please include them in the meeting.

Action Items:

- Review the successful Office 365 migration and discuss any lessons learned.
- Discuss the cloud infrastructure upgrade and address any concerns or questions.

AI Builder provides generative AI capability to create ready to use email template containing minutes of meeting.



CATALYSTMEET

✕ Add New Meeting ✓

General Follow-up Attachments Info

* Title

* Date and Time

12/17/2023  15  :05 

* Category

Risks 

* Subcategory

Project 

Event Type

Presentation 


Key Themes

Find items 

Key People

Find items 

* Groups Represented

Telecommunications 

Project (if applicable)

Find items 





Vendor (If Applicable)

Apple 

Vertical(s)

Find items 

Meeting Synopsis

Format - **B** / U     ...

Include in Monthly Report On

Add/Edit Meeting

CATALYSTMEET

The screenshot shows a Gmail interface on a mobile device. The top bar includes the Gmail logo, a search bar, and a status indicator for 'Active'. The left sidebar shows the 'Compose' button and a list of folders: Inbox (1,047), Starred, Snoozed, Important, Sent, Drafts, and Categories (Social: 2, Updates: 1,011, Forums: 36, Promotions: 110). Below the folders are labels: [Imap]/Drafts, [Imap]/Sent, [Imap]/Trash, Notes, and Personal.

The main email content is from Bisht, Shefali <shéfali.bisht@exchange.tamu.edu> to me, Shefali, dated 2:12AM (12 hours ago). The subject is 'IT Project Roadmap Review Meeting - December 16, 2023'. The body of the email reads: 'Dear Team, I hope this email finds you well. I would like to inform you about an upcoming meeting to review the IT Project Roadmap. Please find the details below: 1. Meeting Title: IT Project Roadmap Review 2. Date & Time: December 16, 2023, at 7:09 PM 3. Attendees: Jim Halpert, Dwight Schrute, Michael Scott, Pam Halpert Agenda: • Successful rollout of Office 365 migration last month with minimal disruption. We received only around 30 help desk calls. Users have now adapted to the new system, and utilization looks good based on analytics. • Cloud infrastructure upgrade went smoothly after extensive load testing. There were no issues in handling 4X volume spikes. • Next steps: Focus on network upgrade and Phase 2 of O365 for SharePoint/Teams. The timeline is on track. Please come prepared to discuss any challenges or roadblocks you may have encountered during the implementation. Additionally, if you have any updates or reports to share, please include them in the meeting. Action Items: • Review the successful Office 365 migration and discuss any lessons learned.'

Meeting
Summary sent via
the Power App.

CATALYSTMEET

Project Management Monthly Feedback Form

Wins Risks Financial Milestones

2

Generate Form

Responses are AI-generated and populated into the form. Edit form as Required.



Shefali Bisht

Monthly Marketing Metrics Review
12/16/2023 7:09 PM

Project

Great month for leads and ads ROI! New landing pages increasing conversion rate - focus group testing helped. Paid search KPIs looking good went from avg CPC \$1.32 down to \$0.98 from ad copy tuning. Email open rate up maybe because new subject lines? Social media engagement also seeing uplift since joined 3 new communities. Keep up content calendar momentum.

Q4 Sales Presentation
12/16/2023 7:46 PM

Organizational

Technology CTO opened meeting praising team for record sales Q3. VP Sales presented Q4 funnel and forecasts - \$1.2M net new projection, traction in enterprise. Need renewals focus & better SLAs. Proposed new bundling strategy for 2024 well received after product demo. Board asked questions about bottom up analysis - needs refinement.

Start Date

12/1/2023

End Date

12/31/2023

Reset

Monthly Meeting Summary Screen: Displays all meetings based on categories, allowing users to efficiently track and manage key aspects of their projects.

Navigate through Categories: Easily access meetings categorized by types such as wins, risks, financials, milestones, and more for a holistic view of project progress and challenges.

CATALYSTMEET

< Project Management Monthly Feedback Form

1. What wins or successes have you had in the past month?

In the past month, we had a successful Monthly Marketing Metrics Review meeting. We saw great results in terms of leads and return on investment (ROI) from our ads. The implementation of new landing pages has helped increase our conversion rate, and we attribute this success to focus group testing. Additionally, our paid search key performance indicators (KPIs) are looking positive, with the average cost per click (CPC) decreasing from \$1.32 to \$0.98 due to ad copy tuning. We have also observed an increase in email open rates, which may be attributed to the use of new subject lines. Furthermore, our social media engagement has improved since joining three new communities. It is important for us to maintain the momentum of our content calendar to continue these successes.

2. If there are any statistics or other metrics that support your wins this past month, please provide here?

N/A

3. What challenges or issues have you identified in the last month within the domains you oversee?

In the last month, the main challenges and issues identified within the domains I oversee were related to security.

Submit Form >

Responses are AI-generated and populated into the form. Edit form as Required.

AI-Generated Responses to Feedback Forms:

Seamlessly create responses to feedback forms directly from the summary screen, streamlining the process of providing input and insights related to specific meetings.

Eliminates the need to access individual meeting details.

CATALYSTMEET

Project Management Monthly Team Form

Submitted By: Shefali Bisht

1. What wins or successes have you had in the past month?

In the past month, we had a successful Monthly Marketing Metrics Review meeting. We saw great results in terms of leads and return on investment (ROI) from our ads. The implementation of new landing pages has helped increase our conversion rate, and we attribute this success to focus group testing. Additionally, our paid search key performance indicators (KPIs) are looking positive, with the average cost per click (CPC) decreasing from \$1.32 to \$0.98 due to ad copy tuning. We have also observed an increase in email open rates, which may be attributed to the use of new subject lines. Furthermore, our social media engagement has improved since joining three new communities. It is important for us to maintain the momentum of our content calendar to continue these successes.

2. If there are any statistics or other metrics that support your wins this past month, please provide here?

N/A

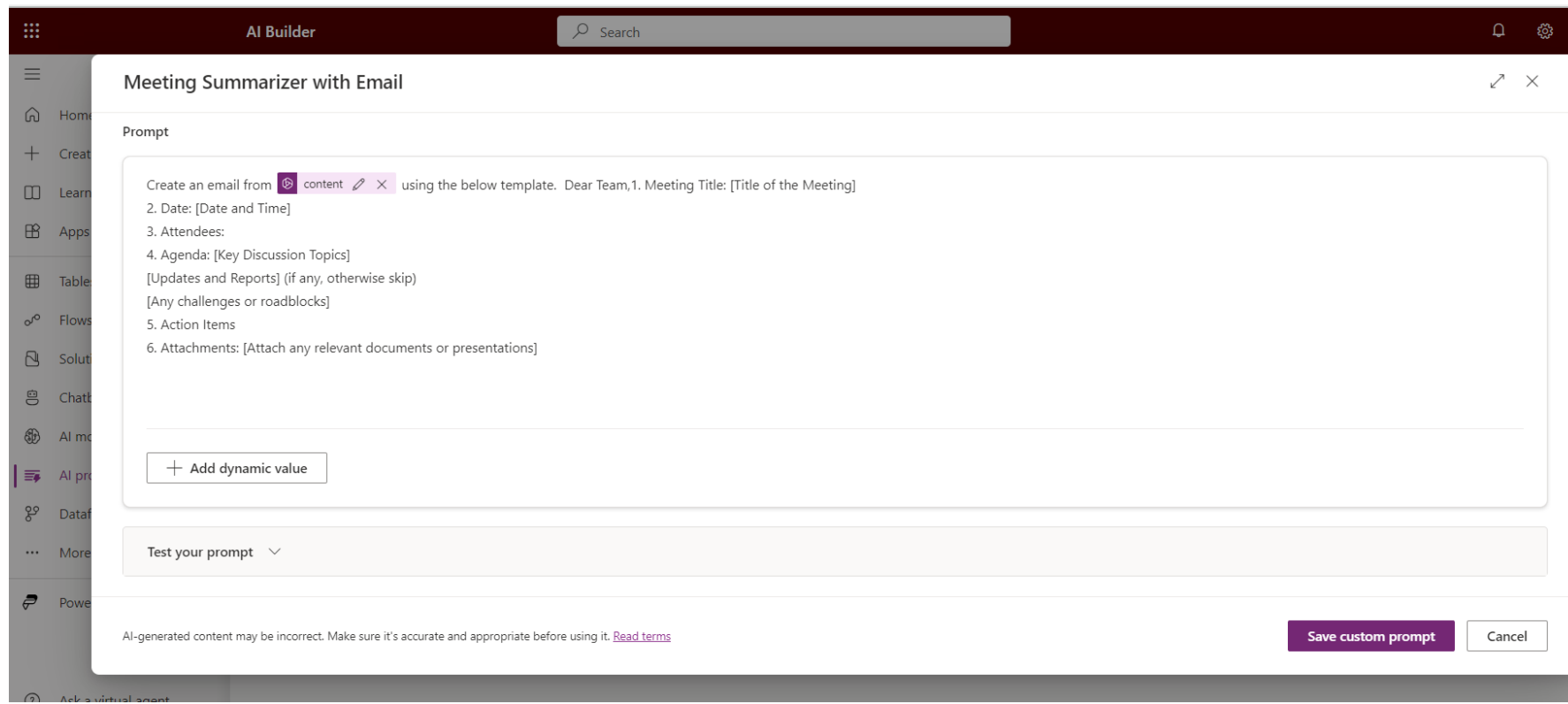
3. What challenges or issues have you identified in the last month within the domains you oversee?

In the last month, the main challenges and issues identified within the domains I oversee were related to security incident response planning. During a meeting titled "Security Incident Response Planning," we reviewed the incidents that occurred in 2022. The majority of these incidents were phishing attacks, but the detection and containment times were praised for being under 6 hours. However, there was a concern regarding the lack of consistent updates to executives after the incidents, which was perceived negatively.




Export meeting summary/feedback form as PDF using Power Automate: brings a seamless and efficient solution to documentation and sharing.

Saves time and effort, and is easily distributed to stakeholders, team members, or external parties, improving accessibility and communication.

AI MODEL CUSTOMER PROMPT (MICROSOFT AI BUILDER)



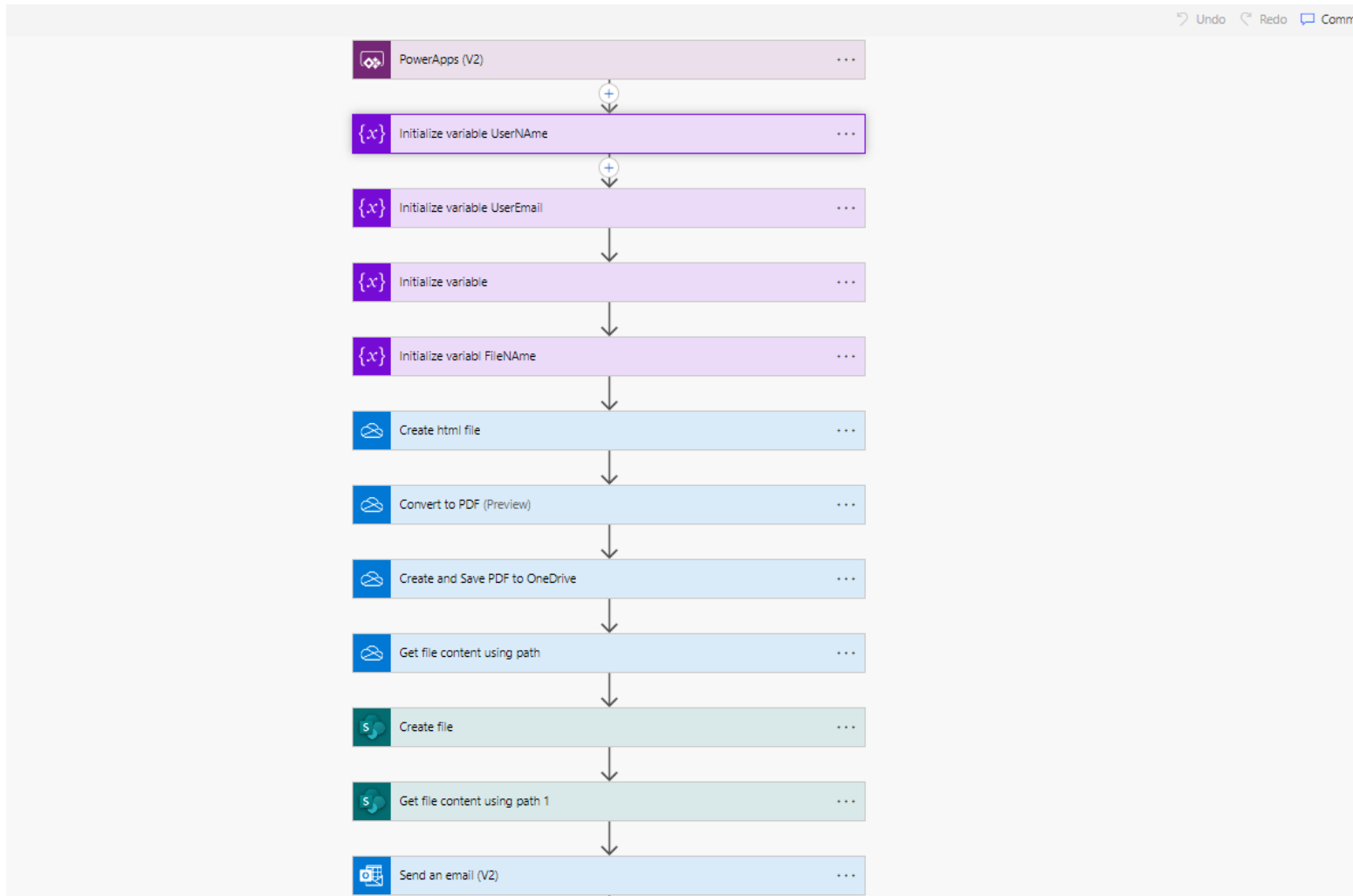
The screenshot shows the Microsoft AI Builder interface. The main window is titled "Meeting Summarizer with Email". The prompt text is as follows:

Create an email from  content   using the below template. Dear Team, 1. Meeting Title: [Title of the Meeting]
2. Date: [Date and Time]
3. Attendees:
4. Agenda: [Key Discussion Topics]
[Updates and Reports] (if any, otherwise skip)
[Any challenges or roadblocks]
5. Action Items
6. Attachments: [Attach any relevant documents or presentations]

Below the prompt text is a button labeled "+ Add dynamic value". At the bottom of the prompt area is a button labeled "Test your prompt" with a dropdown arrow. At the bottom of the interface are two buttons: "Save custom prompt" and "Cancel". A disclaimer at the bottom left reads: "AI-generated content may be incorrect. Make sure it's accurate and appropriate before using it. [Read terms](#)".

Prompt for training a custom model using Microsoft AI Builder: It creates an email given a template and an input content (supplied via Power App portal).

POWER AUTOMATE FLOW



Power Automate flow is triggered from Power App that generates and stores (OneDrive) PDF from HTML, and sends as an email attachment .

CATALYSTMEET IN ACTION

Add New Meeting

General | Follow-up | Attachments | Info

* **Title**
[Text Input]

* **Date and Time**
12/17/2023 [Month] [Day] [Time]

* **Category**
Find items [Dropdown]

* **Subcategory**
Find items [Dropdown]

Event Type
Find items [Dropdown]

Key Themes
Find items [Dropdown]

Key People
Find items [Dropdown]

* **Groups Represented**
[Dropdown]

Project (if applicable)
Find items [Dropdown]

Vendor (if applicable)
Find items [Dropdown]

Verticals
Find items [Dropdown]

Meeting Synopsis
[Text Area]

Include in Monthly Report On

<https://youtu.be/tNEKkwE4hWE>



Thank You!