

AI Tool Selection

Using NotebookLM to Prepare for a High-Stake Client Presentation

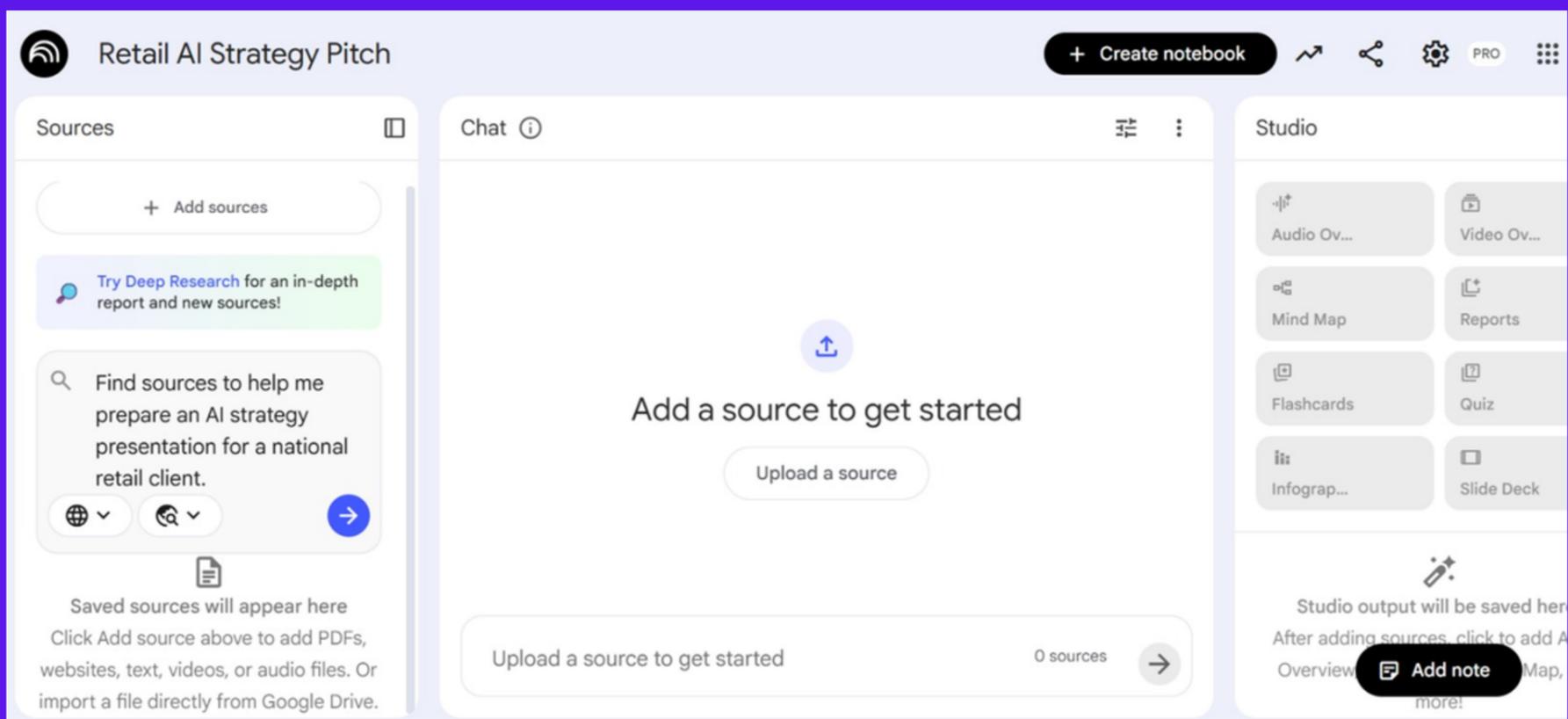


www.optimiseai.com.au



In this tutorial, you will learn how to use NotebookLM to prepare for an important client presentation by collecting background material, structuring insights, generating slide content and creating a personalised rehearsal video.

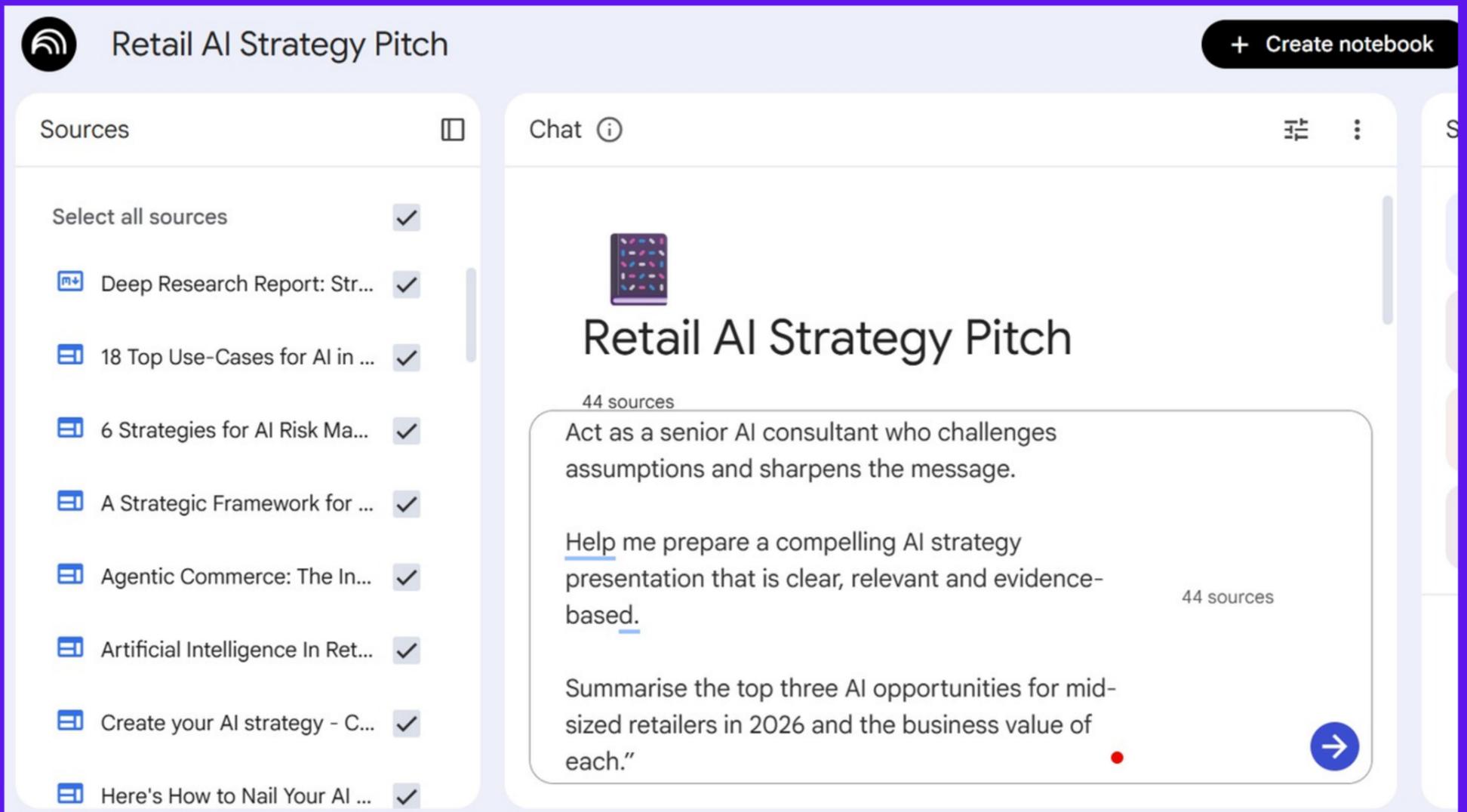




Create your workspace

1. Go to NotebookLM, click “New Notebook” and name it “Client Presentation: Retail AI Strategy Pitch”.
2. Then click “Discover Sources” and enter: “Find sources to help me prepare an AI strategy presentation for a national retail client.”





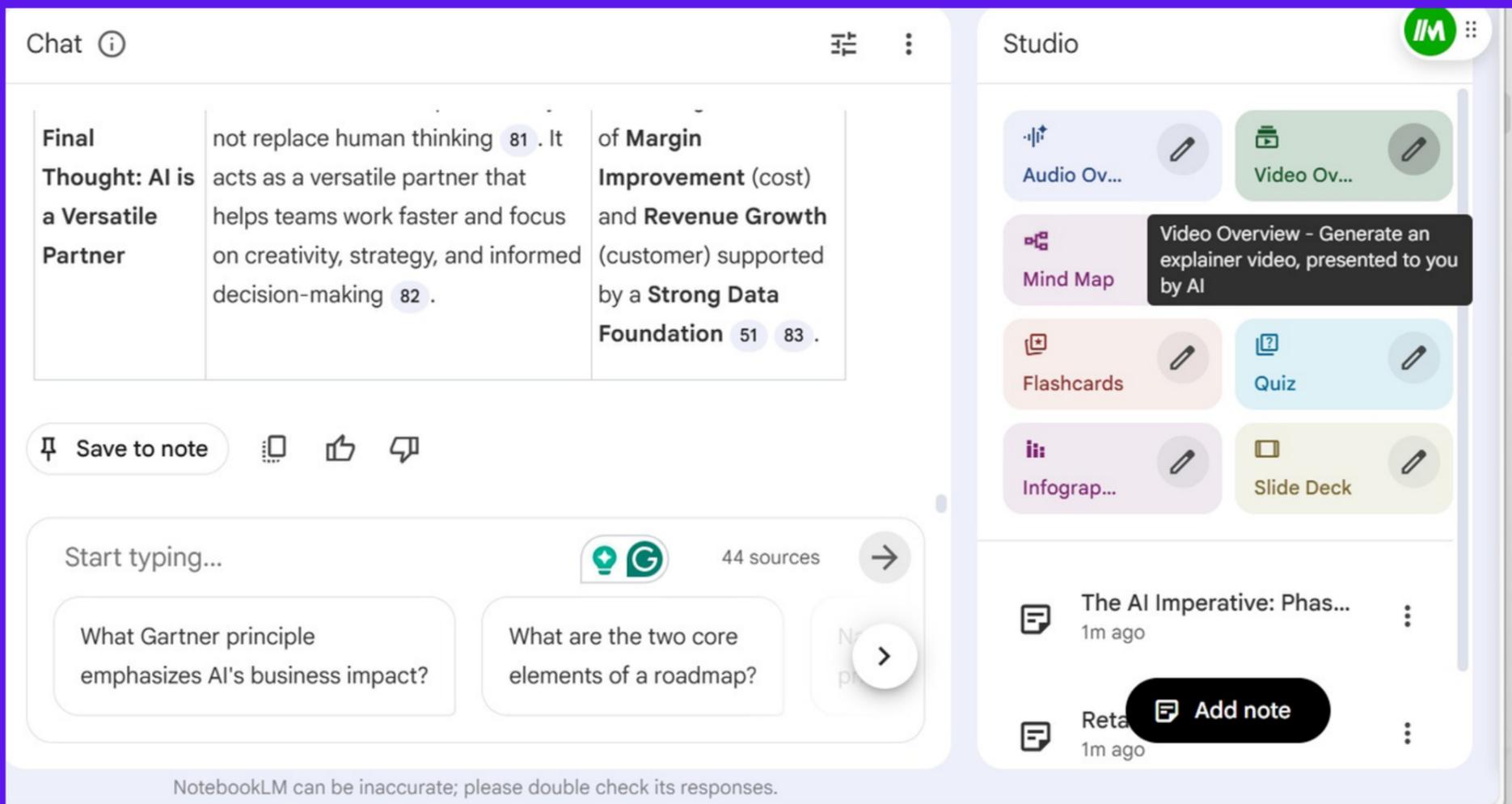
The screenshot displays the Optimise AI interface. On the left, a 'Sources' panel lists various documents, all of which are checked. The main chat area is titled 'Retail AI Strategy Pitch' and contains a prompt: 'Act as a senior AI consultant who challenges assumptions and sharpens the message. Help me prepare a compelling AI strategy presentation that is clear, relevant and evidence-based. Summarise the top three AI opportunities for mid-sized retailers in 2026 and the business value of each.' The prompt is attributed to '44 sources'. A blue arrow button is visible at the bottom right of the chat area.

Generate structured insights

Ask:

1. “Summarise the top three AI opportunities for mid-sized retailers in 2026 and the business value of each.”
2. Save the response as a note.





The screenshot displays the NotebookLM interface, divided into two main sections: Chat and Studio.

Chat Section:

- Final Thought: AI is a Versatile Partner** not replace human thinking ⁸¹. It acts as a versatile partner that helps teams work faster and focus on creativity, strategy, and informed decision-making ⁸².
- of Margin Improvement (cost) and Revenue Growth (customer) supported by a Strong Data Foundation** ⁵¹ ⁸³.

Below the chat content, there are icons for "Save to note", a mobile device icon, a thumbs up icon, and a speech bubble icon. A text input field "Start typing..." is visible, along with a "44 sources" indicator and a right arrow. Two example prompts are shown in rounded boxes:

- What Gartner principle emphasizes AI's business impact?
- What are the two core elements of a roadmap?

A disclaimer at the bottom reads: "NotebookLM can be inaccurate; please double check its responses."

Studio Section:

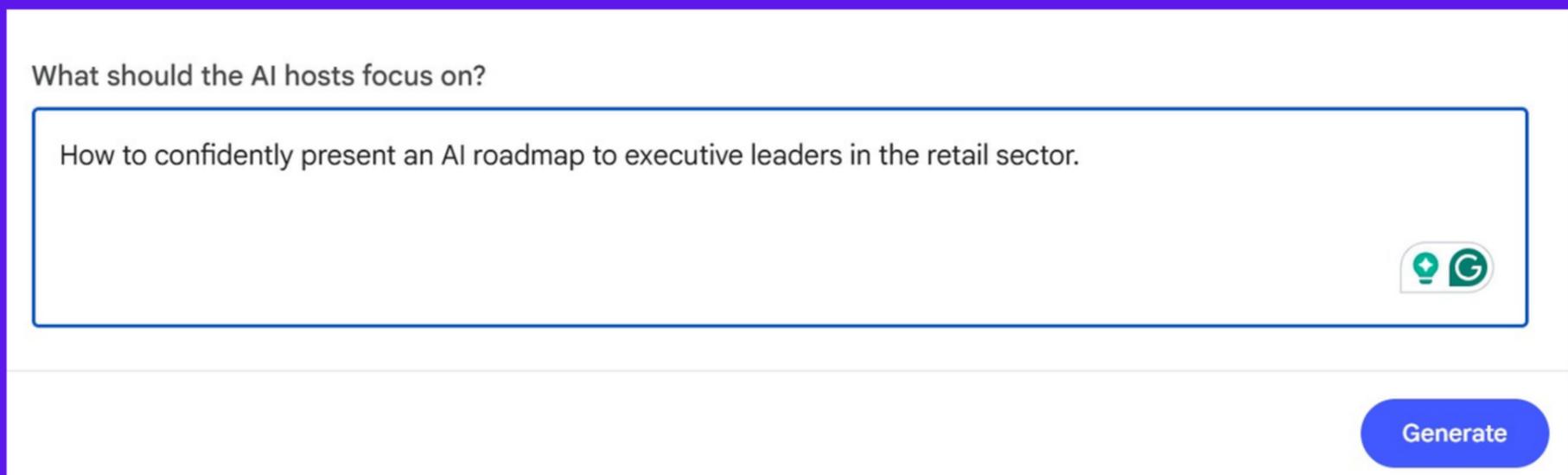
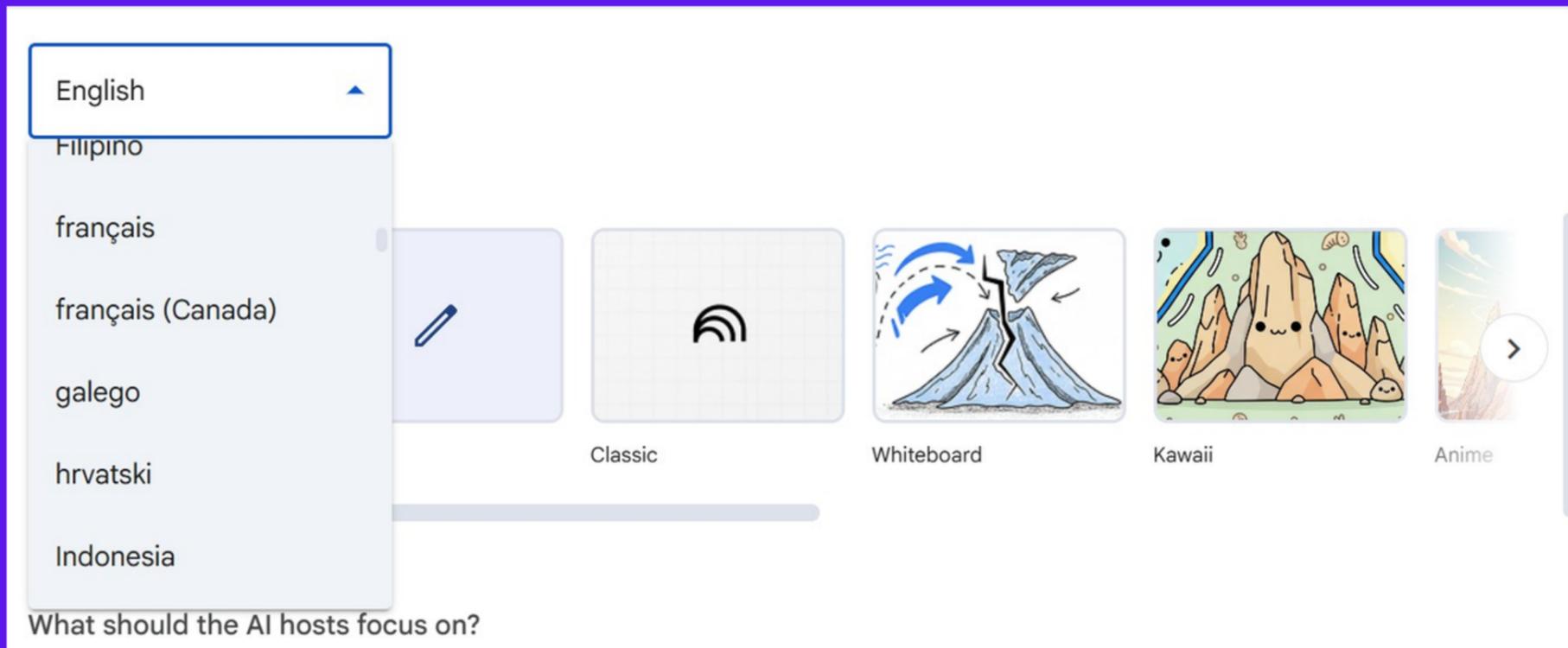
- Tools for content creation: Audio Overview, Video Overview, Mind Map, Flashcards, Quiz, Infographic, and Slide Deck.
- A tooltip for "Video Overview" states: "Video Overview - Generate an explainer video, presented to you by AI".
- Recent notes are listed: "The AI Imperative: Phas..." (1m ago) and "Retail..." (1m ago).
- An "Add note" button is visible.

Create slides or talking points

Ask:

“Using all my sources, draft a 10-slide outline for the presentation with key messages, examples and suggested visuals.”

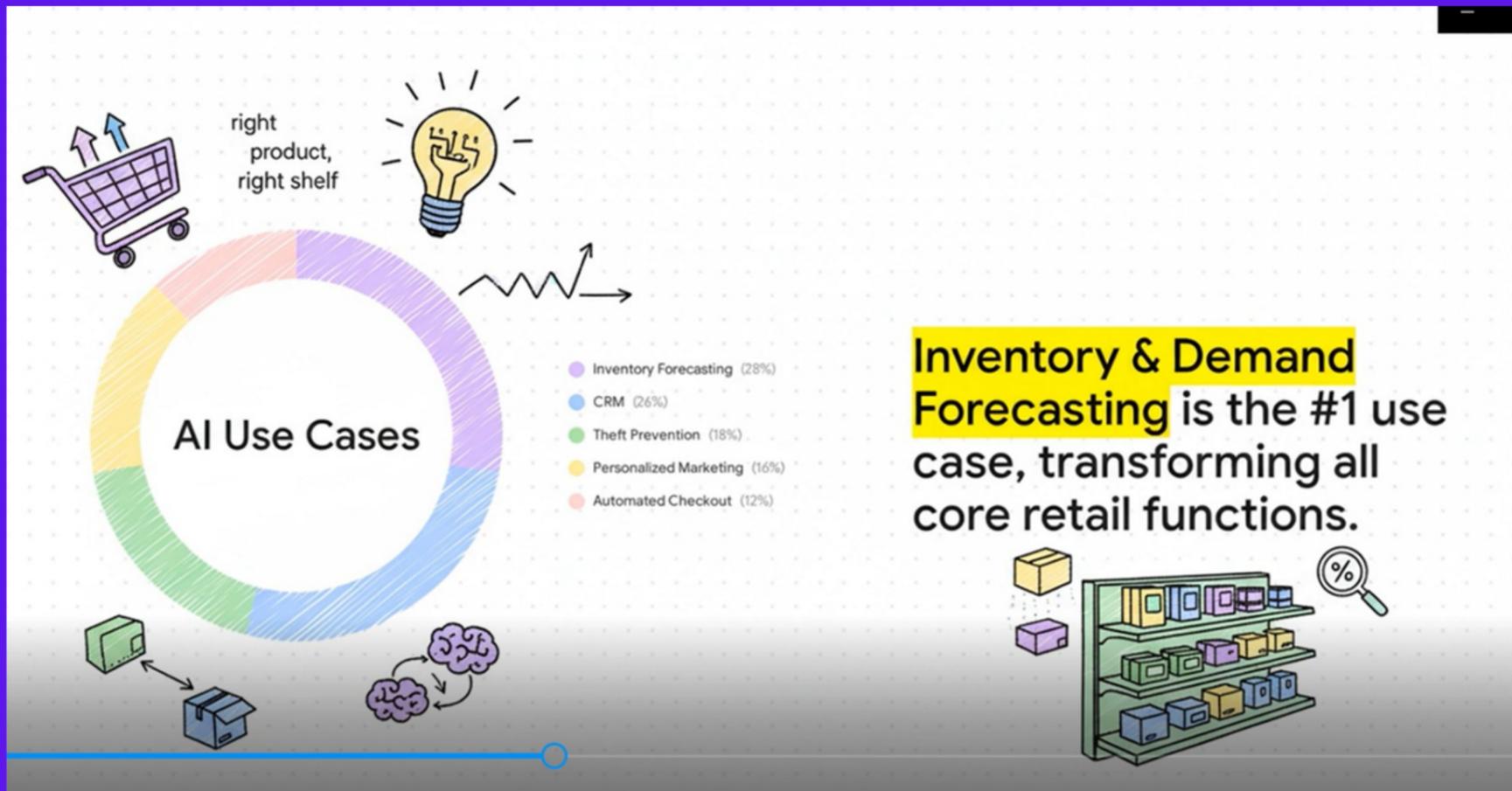




Generate a practice video

- Click the pencil icon on “Video Overview”.
- Add a focus, such as:
“How to confidently present an AI roadmap to executive leaders in the retail sector.”
- Hit Generate to create a personalised rehearsal video tailored to your content.





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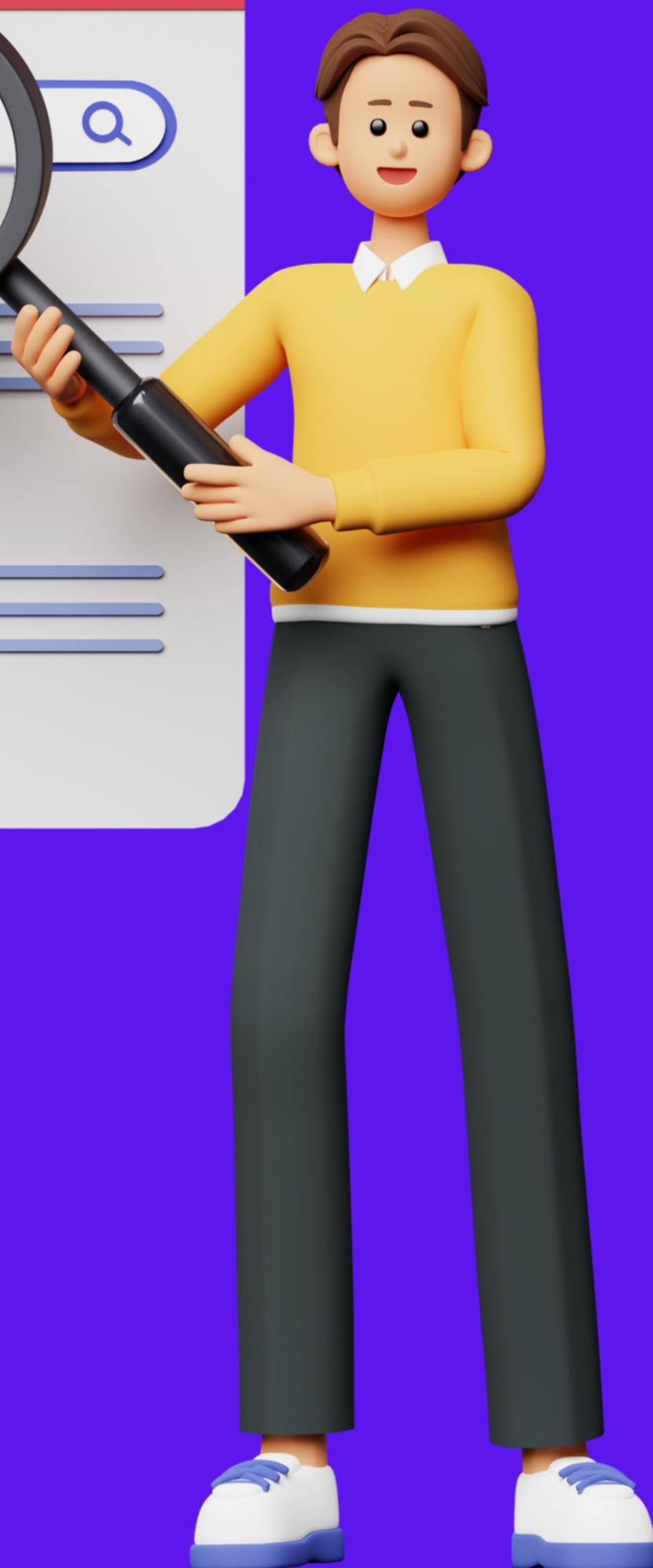




Use the video for rehearsal

Watch the video a few times to practise timing, emphasis and flow. It helps you refine your delivery, handle questions and strengthen your narrative before the real meeting.





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