LEARNING LAB WORKSHOP: SMARTER STRATEGY, STRONGER STORIES, BETTER RESULTS WITH AI

NOVEMBER 2025

Practical tools to accelerate pre-sale through performance storytelling.

THE CHALLENGES WE FACE



JUGGLING MORE THAN EVER

Expectations are high, platforms are numerous, and campaigns never ending. AI can help us do parts of our role faster.



CLIENTS EXPECT MORE, FASTER

Clients need more for us to stay aligned with their needs. Meeting those expectations mean we get to evolve too.



WE WANT OUR WORK TO MEAN MORE

We don't just "run campaigns," we drive impact and finding ways to demonstrate that value is critical to value the work.

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ENTER AI: THE BRIDGE BETWEEN DATA & STORYTELLING

AI DOESN'T REPLACE OUR THINKING, IT ACCELERATES IT.

Typically, strategy, analysis, and storytelling live in silos. Now, AI bridges that gap. It works behind the scenes to:

- Help craft a persuasive storytelling approach
- Identify patterns and trends in the data worth paying attention to
- Suggest themes, headlines, and visual frameworks for reporting

That means we spends less time building slides and more time building meaning, using judgment, creativity, and strategic insight to drive action.



Examples of how we are already using AI across EDGE



Smarter strategy & audience profiling



Shift in storytelling & reporting from data to persuasion



Tools, prompts, & platforms to inspire your own AI journey

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AI ISN'T A COMPETITIVE EDGE, IT'S THE NEW BASELINE

72%
of companies leverage AI as a part of their operations

Use of AI is no longer the exception, it's the rule. OpenAI has now surpassed 400 Million active users.

WHAT IS AI

AI uses machine learning to recognize patterns, predict outcomes, and generate content.

HOW IT WORKS

Large Language Models (LLMs) are trained on massive text datasets. They don't "know facts, but they recommend predictions.

OUR FOCUS FOR TODAY

Explore Generative AI with tools like ChatGPT & Claude to show how EDGE has been using AI to help work faster and smarter.

THE AI ECOSYSTEM



Text + Chat - ChatGPT, Claude, Gemini, Perplexity



Data + Automation - Copilot, Notion AI, Chat GPT ADA



Image Generation - Midjourney, DALL-E, Firefiy



Search - Perplexity, ChatGPT Browse

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WHAT WE'LL COVER TODAY

1

WHY STORYTELLING MATTERS IN THE AGE OF AI

How data storytelling is the most critical skill in marketing – and AI helps connect data to meaning . . . Faster.

2

NEW WORKFLOWS: FROM PRE-SALE TO POST-CAMPIGN

See how AI can streamline every stage – from building pitch narratives and audience profiles, to analysis and insights.

3

REIMAGINED REPORTING MODEL

Learn how collaboration in reporting can elevate our numbers to persuasion through actionable narratives.

4

FROM INSIGHT TO IMPACT

Adopt practical tools from prompts, best practices, and how to use AI responsibility to drive more impactful work.



FELD, RINGLING BROS. – NEW EDGE PARTNER!

01

MEET OUR NEWEST PRE-SALE PARTNER: AI

AI DRIVEN RFP AND AUDINECE PERSONA BUILDING TO HELP BUILD CLIENT VALUE AND TRUST

RESPONSIVE AI: STREAMLING EDGE'S RFP LIFECYCLE

Accelerating RFP qualification, automating response creation, and streamlining workflows to reduce manual lift to curate our brand voice and scale RFP responses with precision.



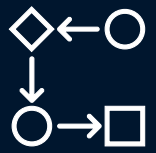
INTELLIGENT RFP QUALIFICATION

Analyzes uploaded RFPs in seconds: identifying key requirements, timelines, and strategic fit to prioritize & pursue high-value opportunities.



CONTENT SHREDDING & KNOWLEDGE RETRIEVAL

Retrieves precise content from our library with RFP content; mirrors EDGE tone, language, and proof points for consistent, brand-aligned responses.



AUTOMATED DRAFTING & WORKFLOW ORCHESTRATION

Generates first-draft responses, flags content gaps, and orchestrates assignments and timelines to keep deliverables aligned and on-track.



TEMPLATE & LEARNING EVOLUTION

Each project strengthens our content library and templates, enabling smarter, faster, and more consistent responses that evolve with every engagement.

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TURNING DATA INTO STRATEGY: ELEVATE MEDIA PLANS WITH AI

ENABLING AI DEVELOPS UNIQUE & IMPACTFUL PITCH STORIES THAT HELP GENERATE PROFIT FOR THE AGENCY.

Leverage insight platforms like Fanbase or YouGov to provide context to AI on prospective analytics & media consumption habits of target audiences.



The more detail I provide (rates, costs, goals, audience, etc.), the more precise the output is



AI can instantly model multiple media allocation scenarios to find the best mix for reach, margin, and impact



Use to test & refine mixes (e.g. Social vs OLV vs Display) to immediately inform pricing, costs & potential performance

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WHERE DATA & STRATEGY MEET: CRAFTING COMPELLING PITCH NARRATIVES

- Inform how to balance 1P vs 3P insights when analyzing our audiences
- Outline the best storylines our data lends itself to
- Understand how to segment audiences for further analysis and activation





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GOODGUYS– EDGE PARTNER SINCE 2018

02

TURN PERFORMANCE INTO A STORY THAT SELLS

WHEN PARTER SUCCESS DEFINES THE GOALS, MEDIA ACTIVATION DELIVERS THE PROOF – ALIGNING INSIGHTS & IMPACT

AI: ALIGNING DATA TO WHAT CLIENTS VALUE MOST

AI helps PS translate fragmented performance metrics into specific outcomes clients care about most – delivering clearer narratives, stronger insights, and more persuasive reporting.



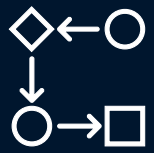
BUSINESS OUTCOMES & IMPACT

- Focused on the result rather than the metric
- Senior/Executive-oriented impact
- Seamlessly ties to client KPI's



PERFORMANCE EFFICIENCY & MOMENTUM

- Highlights trajectory, not just singular metrics
- Gives PS room to talk about improvements, pacing and stability



AUDIENCE BEHAVIOR & MARKET OPPORTUNITY

- Elevates reach into understanding why audiences work
- Includes "market opportunity" to tie into DMA/Geo insights



"TELL ME WHAT THIS MEANS AND WHAT CAN WE DO NEXT?"

- AI drafts clear, executive-ready takeaways so PS can focus on judgement, recommendations, and strategic implications.

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FROM METRICS TO MEANING: DEFINING THE NARRATIVE WITH AI

Before diving into platform metrics, we align on the narrative the client needs to hear. AI accelerates that process with clarity and structure.

Partner Success sets the storytelling vision by identifying:

- What the client values the most
- Which KPIs ladder into that story
- What outcome or theme we're trying to prove



AI translates prompts into multiple narrative paths and highlights which direction best fits the partner's priorities.



AI scans available metrics and identifies the KPI's that actually support the narrative, filtering out the noise.



AI gives PS a strong starting point to refine, adding nuance, caveats, or market context that only the team can provide.

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STORYTELLING FRAMEWORK:
WHERE AI ACCELERATES OUR WORK

AI doesn't replace Partner Success, it strengthens our ability to turn complex performance into aligned, actionable stories.



STORY SETUP: DEFINE THE GOAL

We set the narrative anchor: efficiency, growth, impact, etc. AI rewrites the objective clearly and identifies the KPIs needed



PROOF: ANALYZE & SYNTHESIZE

AI scans channel reports, find patterns and condenses data into aligned insights.



IMPACT: TELL THE STORY

AI drafts the first version of the narrative, suggests visual formats, and translate insights into clear, client-centric takeaways.

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FOWLER AUTOMOTIVE – EDGE PARTNER SINCE 2024

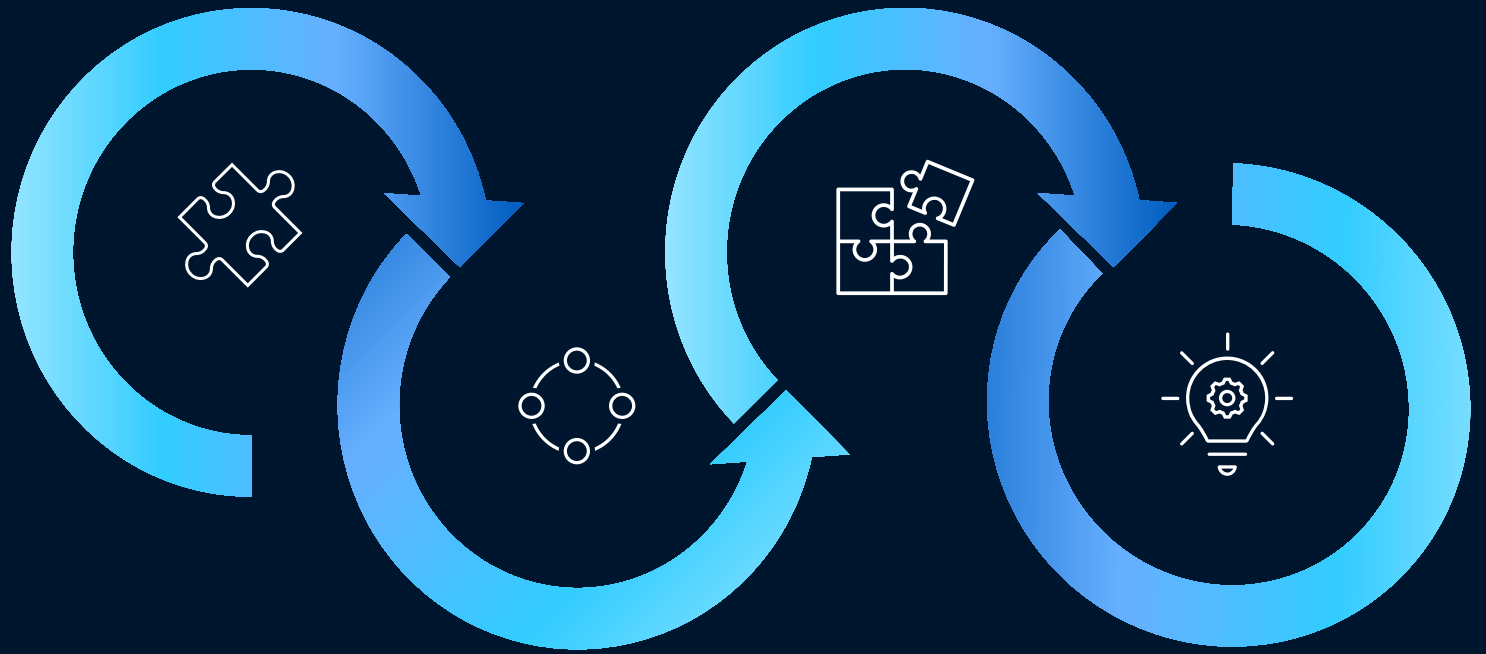
03

ONE VISION, ALIGNED DATA, ENDLESS STORY POTENTIAL

WITH A STORYTELLING VISION, DATA AND INSIGHTS ALGIN FASTER TO HELP VALIDATE THE STORY.

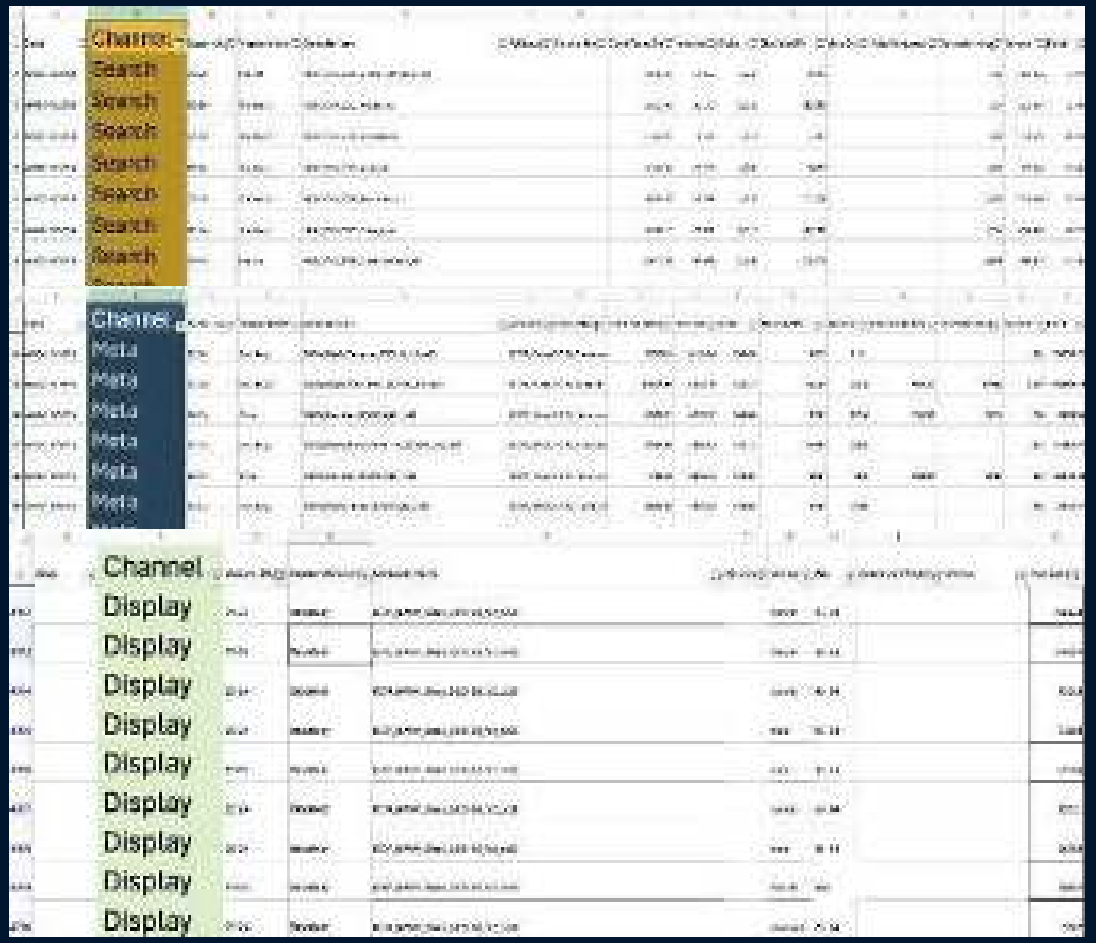
ENTER: DATA NORMALIZATION & WHY IT MATTERS

Normalization is how we turn fragmented metrics into our version of the truth.



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DATA NORMALIZATION





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READY FOR ANALYSIS

Aggregate Age

Row Labels	Sum of Impressions	Sum of Conversion Volume
Broadway	44.53%	48.04%
45 - 54	3.81%	14.84%
35 - 44	5.74%	14.45%
55 - 64	2.59%	7.19%
25 - 34	26.41%	6.93%
65+	2.22%	4.38%
Unknown	0.14%	0.15%
18 - 24	3.62%	0.11%
Other	2.31%	4.55%
35 - 44	0.34%	1.39%
45 - 54	0.22%	1.18%
25 - 34	1.32%	0.76%
55 - 64	0.14%	0.68%
65+	0.12%	0.52%
Unknown	0.01%	0.02%
18 - 24	0.17%	0.00%
Theater	53.16%	47.40%
35 - 44	6.39%	14.21%
45 - 54	3.72%	12.28%
25 - 34	32.89%	8.51%
55 - 64	2.77%	6.75%
65+	2.57%	4.60%
18 - 24	4.64%	0.87%
Unknown	0.19%	0.28%
13-17	0.00%	0.00%
(blank)	0.00%	0.00%
(blank)	0.00%	0.00%
Grand Total	100.00%	100.00%

Inventory Report - Consumer Consumption Habits

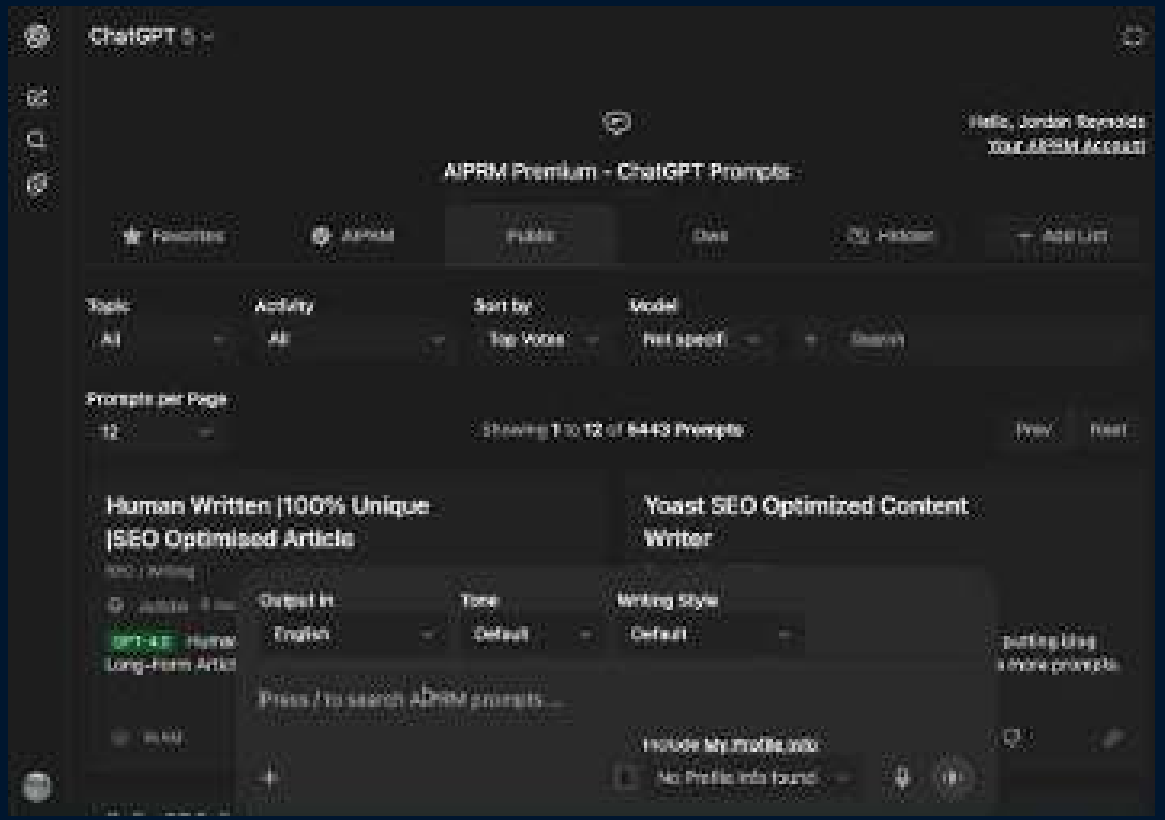
Row Labels	Sum of Impressions
yahoo.com	11.72%
mail.yahoo.com	9.62%
nytimes.com	5.33%
msn.com	4.59%
youtube.com	3.29%
drudgereport.com	2.60%
westword.com	2.39%
mail.aol.com	2.20%
foxnews.com	2.01%
huffpost.com	1.97%
9news.com	1.86%
outlook.live.com	0.97%
cnn.com	0.92%
connect.xfinity.com	0.92%
usatoday.com	0.92%
signupgenius.com	0.87%
buzzfeed.com	0.86%
fandom.com	0.85%
quora.com	0.84%
aol.com	0.82%
people.com	0.79%
screenrant.com	0.70%
nypost.com	0.67%
denverpost.com	0.66%
conservativebrief.com	0.65%
rottentomatoes.com	0.60%

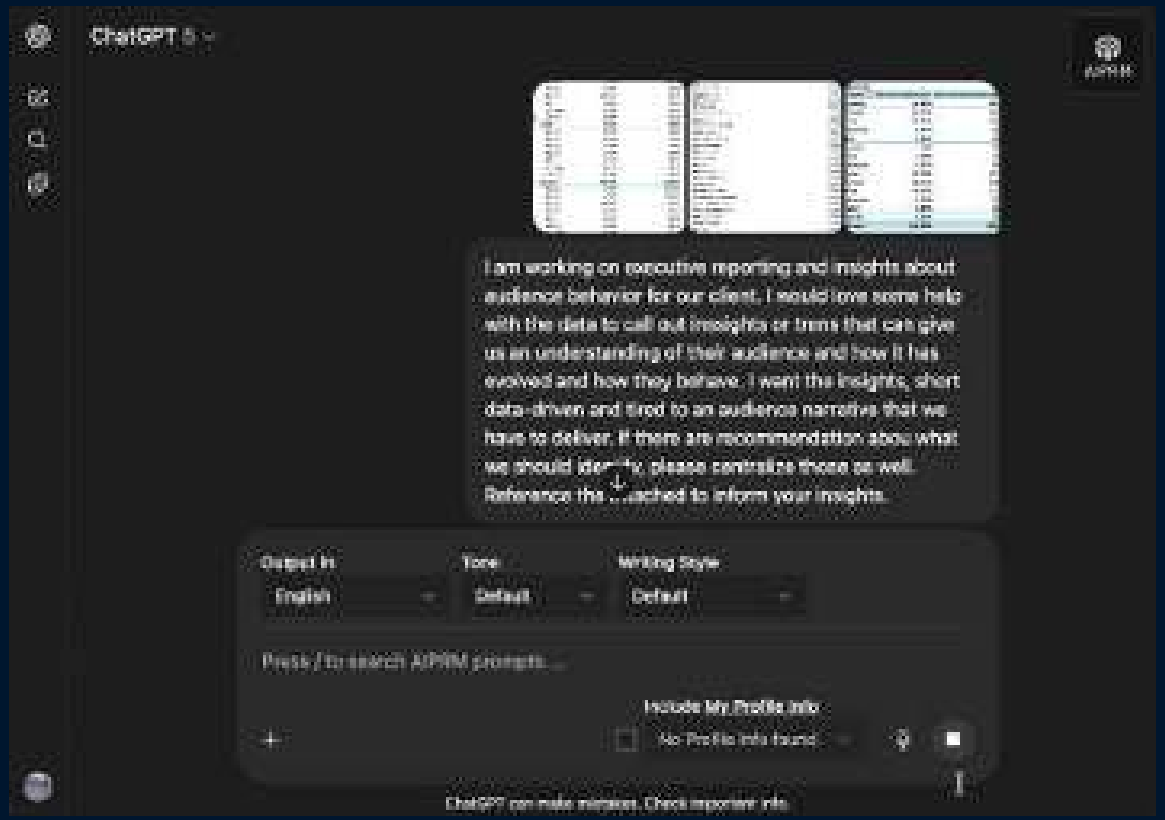
Aggregate Age

Row Labels	Sum of Impressions	Sum of Conversion Volume
Broadway	44.53%	48.04%
Female	24.25%	36.46%
Male	20.01%	10.96%
Unknown	0.27%	0.63%
Other	2.31%	4.55%
Female	1.25%	3.22%
Male	1.03%	1.23%
Unknown	0.02%	0.10%
Theater	53.16%	47.40%
Female	28.41%	34.65%
Male	24.42%	11.99%
Unknown	0.33%	0.76%
(blank)	0.00%	0.00%
(blank)	0.00%	0.00%
Grand Total	100.00%	100.00%

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PROMPTS IN ACTION





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TURNING INSIGHTS INTO STORIES













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HOW WE USE
AI EVERY DAY

STRONG PROMPTS TURN AI INTO A STRATEGY, NOT A SEARCH BAR.

AI's not the headline — it's the helper behind the scenes.

It quietly cleans messy data, finds patterns faster than we can, and drafts the first version of stories we can refine.

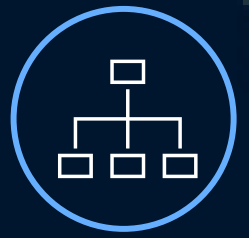
So we spend less time chasing metrics and more time making meaning — focusing on the human part: judgment, creativity, and storytelling.



BRIDGE BUILDER:
Take this data, identify the key executive insights & what story is in the data



SIMPLIFYER:
Rewrite this and simplify for a particular audience



STRUCTURE:
Outline a brief narrative with titles, visuals, and slide layout to sell to a client



HUMAN LAYER:
Tell a story about what engagement data says about *why* fans connect with Your Brand



PROMPT AS A PARTNER:
Here is my report, what am I missing or what assumptions am I making?

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DENVER CENTER FOR THE PERFORMING ARTS – EDGE PARTNER SINCE 2015

04

FROM KNOWING TO DOING: WORKSHOP

ROLL UP YOUR SLEEVES. IT'S YOUR TURN TO PRACTICE CRAFTING CLEAR, CREATIVE, AND PRECISE PROMPTS THAT TURN AI FROM TOOL TO TEAMMATE.

TIPS & TRICKS

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PROMPT POWER: CRAFTING QUESTIONS FOR AI

AI IS ONLY AS SMART AS THE PROMPTS WE GIVE IT.

This workshop is built to challenge each team to extract the most persuasive insight possible from a data set using the fewest number of prompts possible.



Use Jill's recommendations to develop a prompt outline



Remember to be clear, provide context and use a conversational tone



Your team is limited to 5 prompts to get to your final result

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PROMPT POWER: DESIGNING PERSUASIVE INSIGHTS



SAMPLE DATA SET

Every group will receive the same data set. How you decide to use it is up to your group.

Uncover a persuasive insight from the sample data set and frame up a slide for a client deck that explains why your insight is important and what the client should do next.



SLIDE TEMPLATE

Every group will receive the same template slide deck to build their final slide.



GPT PREMIUM ACCESS

Every group will have one ”GPT admin” who has access to ChatGPT Premium.

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REMINDERS & DELIVERABLES



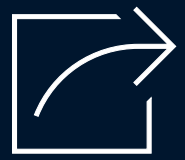
20 MINUTE TIME LIMIT

Use your time wisely. Remember to build in time to design your deck slide and prep for your presentation.



OUTLINE YOUR PROMPT STRATEGY

Be prepared to share why and how you prompted ChatGPT the way you did.



PRESENT YOUR FINAL SLIDE

Share your final slide as if you're pitching to a captive client.

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FROM INSPIRATION TO INTEGRATION



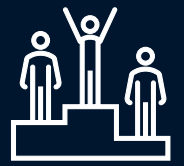
TRY IT: START SMALL, START SMART

Every big shift begins with one change. Choose a single project to test it on. Then try it; but check it.



BUILD NEXT: SHARE & DOCUMENT

Create a prompt library for your team or a reporting template that works and share it out. We are all learning.



EVOLVE TOGETHER: SCALE WHAT WORKS

Once an approach, tool, prompt or platform works, share it and build it into the systems we use to help elevate everyone.

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THANK YOU!

QUESTIONS?