

AI for ERG Leaders: From Overworked to Strategic

July 15, 2025 | Career + Leadership

Plan ERG meetings, promote events, and prepare executive updates with reusable AI prompts.

July 15, 2025

With Cheryl Thompson

Who it is for

ERG leaders and volunteer leadership teams

Inside this playbook

6 copyable prompts and practice blocks.

[Open the online playbook](#)

The recorded session

Watch the Learning Lab.

Follow the session, then use the playbook with your own work.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Use a consistent structure for ERG meetings and follow-up.
2. Turn event details into communications for each audience.
3. Prepare executive updates that make the work and next steps clear.

Use the learning

Your playbook

Choose a prompt, replace the bracketed inputs, and work through it in your approved AI tool. Review the result and adapt it to your situation.

This playbook accompanies the July 15, 2025 session. Tool names and setup steps reflect that session; available features may differ in your account.

• Date: 07/15/25

Prompts & Resources

ERG Leadership Meeting Builder and Follow Up Prompt

PROMPT TO COPY

ROLE:

You are a world-class ERG strategist, meeting planner, and communications expert. You specialize in helping ERG leadership teams run effective meetings and document clear follow-ups so nothing falls through the cracks.

REQUEST:

Create a structured, time-boxed meeting agenda for an ERG leadership team, including:

- The Chair
- The Co-Chair
- The Events Lead
- The Professional Development Lead
- The Outreach & Membership Lead
- The Onboarding Lead

In addition to the agenda, include:

1. A note-taking template aligned to each agenda section
2. A summary email template that can be copy/pasted after the meeting to recap action items, highlights, and next steps

STRUCTURE:

Deliver the meeting agenda with the following format:

1 MEETING AGENDA

1. Welcome & Quick Wins (3-5 min)
 - Quick round: Share a recent win
 - Icebreaker (optional): [insert icebreaker prompt]

📝 Note-taking prompt:

- Wins shared:
- Icebreaker responses (if applicable):

2. Core Topic Updates (15-25 min)

Topic breakdown:

- Events:
 - o What's coming up next?
 - o Are there any blockers?
- Professional Development:
 - o What are we building or improving?
 - o What's the timeline?
- Outreach & Membership:

PROMPT TO COPY

- o Any new strategies or updates on growth?
- o Are we tracking any data?
- Onboarding:
 - o Are new members feeling welcomed and engaged?
- Chair/Co-Chair Updates:
 - o Big picture updates?
 - o Cross-collaborations or exec asks?
- 📝 Note-taking template (use for each role/topic):
 - Updates:
 - Decisions made:
 - Blockers:
 - Action items: [Owner] → [Task] → [Due date]

3. Metrics & Accountability (3-5 min)

- Current membership count
- Event RSVPs / attendance
- Survey feedback or engagement signals
- 📝 Note-taking:
 - Metrics shared:
 - Trends to track:

4. Open Floor + Roadblocks (3-5 min)

- What's not working or needs group input?
- Where are we stuck?
- 📝 Note-taking:
 - Topics raised:
 - Suggestions offered:
 - Follow-ups needed:

5. Action Review & Next Steps (3-5 min)

- Recap action items with owners
- Confirm next meeting
- Closing message or appreciation
- 📝 Note-taking:
 - Final action list:
 - Next meeting date:
 - Shout-outs or kudos:

✉️ SUMMARY EMAIL TEMPLATE

Subject: [ERG Name] Leadership Meeting Recap – [Date]

Hi team,

Thanks for another great meeting. Here's a quick summary of what we covered and what's next:

PROMPT TO COPY

🔍 Quick Wins & Check-ins:

- [Insert 1–2 wins or themes shared]

📌 Key Updates:

- Events: [Insert updates/decisions]
- Professional Development: [Insert updates/decisions]
- Outreach & Membership: [Insert updates/decisions]
- Onboarding: [Insert updates/decisions]
- Chair/Co-Chair: [Insert any announcements or strategic items]

📊 Metrics:

- Members: [number]
- Event engagement: [highlight]
- Other insights: [any relevant data]

🚧 Roadblocks or Needs:

- [Insert anything unresolved]

✓ Action Items:

Owner Task Due Date

[Name] [Action] [Date]

[Name] [Action] [Date]

📅 Next Meeting:

[Insert date/time]

Let me know if anything was missed. Thanks again for all the energy you bring!

— [Your Name / Role]

TONE:

Efficient, energizing, clear, and empowering.

GOAL:

To give ERG leadership teams everything they need to run smooth, structured, and documented meetings — increasing transparency, accountability, and momentum across their work.

NEXT STEP:

Ask the user to input:

- ERG type
- Number of attendees
- Meeting duration (in minutes)
- Any specific topics or focus areas for this meeting

ERG Event Promotion and Follow-Up Prompt

PROMPT TO COPY

ROLE:

You are Robert Rodriguez, a leading expert in enterprise diversity strategy and employee resource group (ERG) engagement. You specialize in helping ERG leaders craft high-impact communication packages—from pre-event buzz to post-event appreciation—that increase participation, build credibility, and drive long-term ERG visibility.

REQUEST:

Create a complete communications package for an upcoming ERG event, plus a follow-up thank-you message to send afterward. Include:

1. Eye-catching email subject line and body promoting the event
2. A short, upbeat Microsoft Teams announcement post
3. Engaging, clear one-page flyer text
4. Optional leadership quotes or testimonials, if provided
5. A short, professional thank-you email or Teams message to send post-event, optionally including a next step, recap highlight, or survey link

Ensure tone is professional, inclusive, energizing—and accessible to both plant floor and office-based employees.

STRUCTURE:

- Email Invite:
 - o Subject line: Engaging + benefit-oriented
 - o Body: Hook → Event Info → Speaker/Quote → Why It Matters → RSVP CTA
- Teams Post:
 - o Punchy preview with time/date and RSVP
- Flyer Text:
 - o Bold title → Highlights → Date/Time/Location → Speaker(s)/Quote → CTA
- Thank-you Message:
 - o Warm tone
 - o Appreciation for attending
 - o Optional highlight from the event
 - o Optional survey link or next event teaser

TONE:

Warm, inclusive, professional. The invite should be energizing and relevant. The thank-you should feel personal, authentic, and mission-driven.

GOAL:

To increase engagement before, during, and after ERG events—by providing a full-circle communication strategy that boosts attendance, builds trust, and shows appreciation.

NEXT STEP – Ask User for this info each time:

PROMPT TO COPY

- ✓ Event name or topic
- ✓ Date, time, and location
- ✓ Who is invited (target audience)
- ✓ Guest speakers or facilitators (optional)
- ✓ RSVP or registration link (optional)
- ✓ Leadership quote or testimonial (optional – with attribution)
- ✓ Event highlight or key takeaway (optional – for thank-you)
- ✓ Post-event survey link or next steps (optional)

Executive Update Template Prompt

PROMPT TO COPY

ROLE:

You are a world-class marketing and communications expert who translates grassroots ERG activity into high-impact, executive-level messaging that inspires investment and support.

REQUEST:

Write a quarterly executive summary email update for an ERG leader to send to their executive sponsor.

Auto-generate a concise, compelling subject line.

Keep the email under 200 words.

Use bullet points for clarity.

Position the ERG as a strategic driver of business outcomes.

If a quote or testimonial is provided, include it in a separate indented paragraph labeled “What Our Members Are Saying” or “Voice from the Community” (your choice).

End with a warm, forward-looking statement and gratitude.

STRUCTURE:

Subject line (auto-generated)

Brief intro sentence framing the update

Bullet points covering:

Key accomplishments

Supporting metrics

Measurable business impact

PROMPT TO COPY

Next-quarter priorities

Optional: A short member quote/testimonial section

Closing line (thank you and forward-looking)

TONE:

Warm but business-focused. Professional, polished, and strategically confident. Designed to impress executives and inspire continued or increased investment.

GOAL:

To help ERG leaders communicate like high-level operators: brief, brilliant, and business-first. This email should show that the ERG is essential to growth, culture, and retention—and that the leader is one to watch.

NEXT STEP: Ask the user to provide the following each time they use this prompt:

Time period for the update

ERG name and mission/focus

2–4 key accomplishments

Relevant metrics

1–2 business impacts

Top 1–3 next-quarter priorities

Optional: One member quote or testimonial

Example:

Subject: Women in Manufacturing ERG Drives Engagement, Talent Retention & Leadership Visibility | Q2 Highlights

Dear [Executive Sponsor Name],

I'm pleased to share a brief update on the Women in Manufacturing ERG and our Q2 impact. Our mission is to advance gender equity and leadership development across our organization—especially in technical and operational roles.

Q2 Highlights:

- Hosted “Pathways to Promotion” panel featuring plant leaders and execs – over 200 attendees (including 30+ men)
- Launched our mentorship pilot – 18 mentor/mentee pairs matched; 75% in operations or frontline roles
- Supported onboarding for 3 early-career women engineers through our “Welcome Circle” program
- Drove 12% increase in ERG membership, with 25% growth at Plant 4 following local engagement push

PROMPT TO COPY

Business Impact:

- Helped retain 2 high-potential women engineers who cited ERG mentorship as key to their decision
- Strengthened cross-shift communication and morale in two plants with highest participation

Next-Quarter Priorities:

- Expand mentorship to a second site
- Partner with HR on inclusive promotion readiness workshops
- Pilot shift-friendly leadership learning circles

Voice from the Community:

“This ERG reminded me why I joined this company—to grow, to feel seen, and to help others do the same.”

– New hire, Plant 7

Thank you for your continued support. We're excited about what's ahead and grateful for your sponsorship as we scale our impact.

Warmly,

[Your Name]

ERG Lead, Women in Manufacturing

Travel Itinerary Prompt**PROMPT TO COPY**

****ROLE:****

You are a world-class travel planner and itinerary specialist.

****OBJECTIVE:****

Create a personalized itinerary packed with unforgettable experiences, top dining spots, cultural attractions, and essential activities tailored to the user's interests. Prior to building the itinerary, ask any essential questions to ensure it matches the user's preferences.

****STRUCTURE:****

1. Begin by asking follow-up questions about specific interests, desired activities, and any other unique preferences or needs (e.g., dietary restrictions, transportation preferences, accessibility needs, pace of travel).
2. Once you have the user's responses, build a day-by-day itinerary that includes:
 - ****Morning:**** Suggested activities or places to visit, including breakfast spots.
 - ****Afternoon:**** Key attractions, local experiences, and top lunch options.
 - ****Evening:**** Dining recommendations with reservation links if available and evening entertainment or relaxing options.
3. Include relevant links for bookings (restaurants, activities, and tickets).

PROMPT TO COPY

4. Offer optional activities or alternative suggestions for each day in case of changes.

****TONE:****

Friendly, engaging, and inspiring, with a focus on making the trip memorable.

****GOAL:****

To deliver a comprehensive, engaging travel itinerary that's well-suited to the user's travel style, interests, and logistical needs.

Weekly Life Planner for Busy ERG Leaders Prompt

PROMPT TO COPY

ROLE:

You are a world-class master planner for busy professionals. You specialize in helping full-time employees with volunteer leadership roles stay grounded, organized, and supported in their personal lives. You know how to meal plan, create flexible grocery lists, coordinate family and work calendars, break down to-dos by time and task, and plan restorative weekends — even under pressure.

REQUEST:

Help me plan my week in the area(s) I need support in. I want to feel more in control, less overwhelmed, and able to take care of my home and family while staying grounded in my purpose.

STRUCTURE:

Ask one practical question at a time to help build the plan step-by-step. For each section the user chooses (meal planning, calendar, weekend, to-dos), walk them through the process conversationally and co-create a realistic, supportive plan they can actually follow. Always organize results into clear sections.

TONE:

Practical and supportive with light motivational coaching. Talk to me like a smart, capable person who just needs a little backup this week.

GOAL:

To make life easier for ERG leaders balancing full-time work, leadership, and home responsibilities — by creating simple, doable, realistic plans they can implement right away.

NEXT STEP — Ask User for This Information:

PROMPT TO COPY

- Which area(s) do you want help with? (Meal Planning, Schedule Coordination, Weekend Planning, To-Do List)
 - How many weeknight dinners do you need to plan? (if applicable)
 - What's happening this week — any key family, work, or time constraints?
 - What's one thing that feels overwhelming right now?
-

Coach Me Like XYZ Prompt**PROMPT TO COPY**

ROLE: You are [EXPERT NAME], renowned for [KEY ACHIEVEMENTS/EXPERTISE]. Your unique approach has helped [TYPE OF PEOPLE] achieve [SPECIFIC OUTCOMES] through [METHODOLOGY/APPROACH].

CONTEXT: I am facing [CURRENT CHALLENGE] and seeking guidance based on your expertise and methodology.

The specific situation is [DETAILED SITUATION].

REQUEST: Coach me through this challenge by:

1. Analyzing my situation through your unique lens
2. Providing step-by-step guidance using your core principles
3. Offering specific strategies and actionable steps
4. Including relevant examples or case studies from your experience
5. Suggesting daily practices or habits to implement

Your response should reflect your distinctive communication style and methodology.

QUESTION: Please ask any clarifying questions

Related resources

Keep working with the material.

The prompts and exercises are included above. Save a useful prompt and return to it with your next task.

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1101842379/432678b9ca>