

ERG Leaders: From Overworked to Strategic

May 19, 2026 | Career + Leadership

Connect ERG strategy to business outcomes, simplify communications, and reduce volunteer workload.

May 19, 2026

With Cheryl Thompson

Who it is for

ERG leaders, core teams, and executive sponsors

Inside this playbook

15 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. Connect ERG work to business outcomes.
2. Simplify communications and recurring coordination.
3. Prepare useful updates for your executive sponsor.

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 May 19, 2026 session. Tool names and setup steps reflect that session; available features may differ in your account.

Welcome to Your AI Toolkit

You said yes to leading the ERG because you believe in the mission. But nobody told you it would feel like running a second job on top of your first one. You're planning events, writing communications, tracking membership, building business cases for budget, and reporting to your executive sponsor, all on volunteer time. You're burning out, and you're not alone. This playbook gives you three AI prompts that move you from event planner to strategic leader: build a one-page ERG strategy that connects to business outcomes, create communications and reports in minutes instead of hours, and identify tasks AI can handle so your core team stops burning out.

- You don't need to use everything at once. Start with the one prompt that solves your most immediate problem.
- These prompts work across platforms: Copilot, ChatGPT, Gemini, Claude, or your company's internal AI tool.
- Each prompt includes a main version (for licensed tools with full context windows) and an alternate version (for free Copilot or tools with limited input).

How to Use This Playbook

- **Start with Prompt #1.** Paste your ERG's goals, past activities, and aspirations. Let AI build a one-page strategy that connects your work to business outcomes your executive sponsor cares about.
- **Streamline your communications.** Use Prompt #2 to draft event promotions, membership updates, executive sponsor reports, and business impact summaries in minutes.
- **Protect your team from burnout.** Use Prompt #3 to audit your ERG's workload and identify every task AI can handle, so your volunteers spend time on impact, not administration.
- **Give AI context before asking for help.** The more specific you are about your ERG's mission, your organization's priorities, and your team's capacity, the better the output.
- **Review and refine.** AI drafts. You ensure it reflects your ERG's authentic voice and values. Never let AI-generated content misrepresent your community or your mission.

The ERG Strategic Framework

Most ERGs are stuck in event-planning mode. Strategic ERGs connect every activity to business impact: talent, innovation, market insight, and culture.

Stage	What It Looks Like	Leadership Perception	Impact
Event Planner	Monthly lunch-and-learns, heritage month celebrations, social hours. Activities driven by tradition, not strategy.	"Nice to have." Budget is first to be cut.	Low. Visible but not measurable.
Community Builder	Mentoring programs, onboarding buddy systems, professional development workshops. Activities build belonging.	"Good for culture." Budget is maintained.	Medium. Retention and engagement impact.
Business Partner	ERG insights inform product decisions, talent strategy, market expansion. Activities tied to business outcomes.	"Strategic asset." Budget is invested in.	High. Measurable business contribution.

Key Insight: You don't have to stop doing events. You have to start connecting them to outcomes. A heritage month celebration becomes strategic when it generates market insights. A mentoring program becomes strategic when it improves retention metrics. The activities can stay the same. The framing changes everything. **The Sustainability Equation**

- **Strategic clarity** (knowing what matters) + **AI efficiency** (automating the admin) + **Shared leadership** (distributing the work) = **Sustainable ERG impact**
- If any one of these is missing, ERG leaders burn out. Strategy without efficiency means you know what to do but can't keep up. Efficiency without strategy means you're fast at the wrong things. Both without shared leadership means it all rests on you.

The AI Efficiency Ladder

Know where you are. Know where you're going.

Level	What It Looks Like	Time / Task
1. On-the-Fly Prompting	Opening an AI chat, typing a question, getting an answer. Starting from scratch every time.	5 to 10 minutes, inconsistent

Level	What It Looks Like	Time / Task
2. Repeatable Prompts	Saved templates you fill in. Same quality every time because same structure.	2 to 3 minutes, consistent
3. Custom AI Projects	AI pre-loaded with your ERG context. Your mission, your metrics, your stakeholders. Works like a team member.	1 to 2 minutes, personalized
4. Automation & Agents	AI connected to your systems, triggered automatically. Runs without you.	0 minutes, scales

Your goal: Move from Level 1 to Level 2. The prompts in this playbook get you there.

The Prompt Structure

Every strategic prompt has four parts:

Part	Purpose	Example
ROLE	Who should AI pretend to be?	"You are an ERG strategy advisor who helps employee resource group leaders connect their work to business outcomes..."
CONTEXT	What does AI need to know about you?	"I lead our Women in Manufacturing ERG at a Tier 1 supplier with 2,000 employees across 3 plants..."
REQUEST	What specifically do you want?	"Build a one-page ERG strategy connecting our goals to business outcomes with 3 priorities and 3 metrics..."
DISCOVERY QUESTIONS	Force AI to ask all questions at once, accept any answer format, then produce output.	"Stop. Ask me ALL these questions at once in one numbered list. Accept narrative answers. Do not re-ask."

Key Prompts from This Lab

This lab teaches three prompts that work as a system: **Strategize, Communicate, Sustain.**

Prompt #1: The ERG Strategy Builder

What it's for: Turning your ERG's scattered goals, past activities, and aspirations into a clear one-page strategy that connects to business outcomes, so your executive sponsor sees a strategic partner, not just an event calendar. **When to use it:** At the start of each year or quarter. When you need to justify budget. When your executive sponsor asks "What's your strategy?" and you want an answer that sounds like a business leader, not a volunteer coordinator.

Main Version (Licensed Copilot / ChatGPT / Gemini / Claude)

PROMPT TO COPY

ROLE

You are a strategy advisor for the automotive industry. You help leaders of internal employee groups connect their group's work to business outcomes that executives care about: talent attraction, retention, innovation, market insight, and culture.

CONTEXT

I lead (or co-lead) an internal employee group at an automotive company. I want to build a clear strategy that demonstrates business value. My group is doing good work, but it isn't connected to measurable outcomes, and my executive sponsor needs to see a strategic plan, not just an activity list.

REQUEST

Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output below and note any assumptions you made.

Using the information I provide, create:

1. ONE-PAGE STRATEGY

- Vision statement (one sentence)
- Mission alignment (how the group connects to company priorities)
- Three priorities for the next 12 months, each with: goal, two or three activities, business outcome, success metric
- Resource needs (budget, time, leadership support)

2. BUSINESS CASE NARRATIVE

A one-paragraph narrative your executive sponsor can use with senior leadership: what the group does, how it supports business results, and what it needs to keep going.

3. EXECUTIVE SPONSOR ALIGNMENT GUIDE

PROMPT TO COPY

- What to ask your executive sponsor for
- How to frame your asks in business terms
- A 15-minute monthly check-in agenda template

4. ACTIVITY-TO-IMPACT CONNECTOR

A table with columns: Activity, Business Outcome, Metric, How to Track. Show how existing activities can be reframed as strategic initiatives.

DISCOVERY

1. What group do you lead and what is its focus?
2. What are your current activities and programs?
3. What are your company's top strategic priorities?
4. How many members? How active is your core team?
5. What does your executive sponsor currently know and think about the group?
6. What's your biggest challenge right now?

Alternate Version (Copilot Free / Limited Context)**PROMPT TO COPY**

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)

Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)

Produce the deliverable I'm asking for.

I lead the [GROUP NAME] at [COMPANY TYPE: OEM / Tier 1 / Dealer Group].

Our focus: [GROUP FOCUS AREA]

Current activities: [LIST WHAT YOU DO NOW]

Company priorities: [LIST 2 TO 3 COMPANY STRATEGIC GOALS]

Biggest challenge: [WHAT'S HARDEST RIGHT NOW]

Create:

1. A one-page strategy (vision, three priorities with goals, activities, business outcomes, and metrics)
2. A one-paragraph business case my executive sponsor can share with senior leadership
3. A table connecting each current activity to a measurable business outcome
4. A 15-minute monthly check-in agenda for my executive sponsor meeting

PROMPT TO COPY

Frame everything in business language. Show how the group's work supports talent, innovation, market insight, and culture.

Example Scenario: Defending the Budget

EXAMPLE TO COPY

I co-lead the Women in Manufacturing ERG at Westbrook Components, a Tier 1 automotive supplier. We have 2,300 employees across HQ in Royal Oak Michigan and three plants (Romulus Michigan, Hopkinsville Kentucky, Saltillo Mexico). Our ERG has 180 members company-wide. Our core team is 7 women: a chair, co-chair, events lead, professional development lead, outreach lead, communications lead, and metrics lead. We have been running for 4 years.

What we do today: monthly virtual lunch-and-learns (about 40 attendees each), a yearly International Women's Day event at HQ (about 120 people), an annual mentoring program that matches roughly 25 pairs each January, a quarterly newsletter, a private Teams channel with 180 members, and a Plant Floor Connect program that flies a small group of women engineers from HQ to each plant twice a year to meet hourly women on the line.

Company strategic priorities for the next 12 months: (1) launch the new electric drive unit program for our largest OEM customer, which means hiring 240 new engineers and technicians over 18 months; (2) reduce voluntary engineering attrition, which hit 18 percent last year against an industry benchmark of 11 percent; (3) improve operational performance at Hopkinsville where productivity has lagged the other two plants for three quarters.

Our executive sponsor is the SVP of Operations. He is supportive but distracted. We have 15 minutes with him every other month. He has never asked us for a strategy document. He has asked us twice this year what our metrics are and we did not have a clean answer.

Biggest challenge: our CFO sent our sponsor a note last week asking him to justify our 28,000 dollar annual ERG budget. Open enrollment for next year's budget cycle is in 6 weeks. We need to show measurable business impact, not a list of events. If we lose the budget, we lose the mentoring program, the Plant Floor Connect travel, and the IWD event, which would gut us.

Prompt #2: The ERG Communication Engine

What it's for: Drafting all the communications ERG leaders spend hours writing. Event promotions, membership updates, executive sponsor reports, impact summaries, and business case presentations, in minutes instead of hours. **When to use it:** Before any event (promotion and follow-up), quarterly (sponsor reports), annually (impact summaries), and whenever you need to communicate ERG value to any audience.

Main Version (Licensed Copilot / ChatGPT / Gemini / Claude)

PROMPT TO COPY

ROLE

You are a communications specialist for internal employee groups in the automotive industry. You help group leaders draft professional, engaging communications that build membership, demonstrate impact, and maintain executive support, all in a fraction of the time it normally takes.

CONTEXT

I lead an internal employee group on volunteer time. I don't have hours to spend on communications. I need professional-quality drafts I can quickly review and send.

REQUEST

Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Based on what I need, create:

1. EVENT COMMUNICATION KIT

For an upcoming event or initiative:

- Save-the-date announcement (email plus Teams or Slack post)
- Full event promotion (email with compelling hook, details, RSVP link)
- Manager talking points (so they encourage their teams to attend)
- Day-of reminder (short, energetic)
- Post-event follow-up (thank attendees, share highlights, next steps)
- Social media or internal post (if applicable)

2. QUARTERLY EXECUTIVE SPONSOR REPORT

- Group dashboard: membership, events, participation trends
- Impact highlights (connected to business outcomes)
- Budget utilization
- Challenges and needs
- Next quarter priorities

PROMPT TO COPY

- Format: one page, skimmable, professional

3. ANNUAL IMPACT SUMMARY

- Year-in-review narrative (what the group accomplished)
- Key metrics and outcomes
- Member highlights or stories (provide prompts for gathering these)
- Business impact statement
- Vision for next year

4. BUSINESS CASE FOR BUDGET OR RESOURCES

- What the group needs and why
- ROI framing (investment vs. return in retention, engagement, employer brand)
- The ask (specific, actionable, time-bound)

DISCOVERY

1. What do you need right now? (event promo, sponsor report, budget request, etc.)
2. What's the context? (upcoming event, quarterly review, annual planning)
3. What are your group's recent highlights?
4. Who's the audience for this communication?
5. What tone does your organization expect? (corporate formal, casual, energetic)

Alternate Version (Copilot Free / Limited Context)

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)

Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)

Produce the deliverable I'm asking for.

I lead the [GROUP NAME] and I need to draft:

[CHOOSE: event promotion / executive sponsor report / annual impact summary / budget request]

Context:

[DESCRIBE THE EVENT, ACCOMPLISHMENTS, OR REQUEST]

Group highlights: [LIST 3 TO 5 RECENT ACCOMPLISHMENTS]

PROMPT TO COPY

Audience: [WHO WILL READ THIS]

Tone: [CORPORATE / CASUAL / ENERGETIC]

Create a professional, ready-to-send draft. Keep it concise. Include a hook that shows business impact, not just activities.

Example Scenario: Q2 Panel Promotion and Q1 Sponsor Report at the Same Time

EXAMPLE TO COPY

I lead the Veterans and Allies ERG at Northport Driveline, a Tier 1 supplier with 4,100 employees across our HQ in Auburn Hills Michigan and four plants (two in Michigan, one in South Carolina, one in Mexico). Our ERG has 410 members, about 30 percent of whom are veterans and 70 percent are allies. Our core team is 6 people: chair, co-chair, events lead, recruitment partnership lead, comms lead, and external partnerships lead.

I need two things this week:

FIRST: Promote our Q2 panel event, "From Service to Supply Chain: Veteran Career Paths in Manufacturing." Date is Wednesday May 21 at noon Eastern. Hybrid format: in person at HQ Auburn Hills, livestreamed to all four plants on break-room TVs and in the cafeterias. Four panelists: a plant manager who served 8 years in the Army, a quality engineer who came in through our veterans hiring program three years ago, a procurement director who was a Navy logistics officer, and our VP of HR who is a Marine Corps veteran. Moderated by our co-chair. We expect 80 in person and 200 to 300 watching across all sites. Free. Open to all employees. RSVP through our internal events system. We want strong manager turnout because the panelists are going to talk about veteran retention and career pathing, and managers are the lever.

SECOND: Draft our Q1 quarterly sponsor report. Our executive sponsor is the COO. Q1 highlights: hosted two career coffee chats with veteran applicants (12 attendees total, 3 hires made), launched a new "Welcome Wall" recognition program for newly-hired veterans (8 recognitions issued in Q1), partnered with three local veteran service organizations on a recruitment pilot at Selfridge Air National Guard Base that generated 47 qualified applications, and grew membership by 40 people (12 percent quarter over quarter). Budget utilization: 8,200 dollars of our 32,000 dollar annual budget used in Q1 (mostly the recruitment pilot, which the COO approved out of cycle). Challenges: the Mexico plant has zero veteran population by definition, so we are working on how to make the ERG meaningful for our Saltillo allies. Next quarter priorities: scale the Selfridge pilot to one more base, launch a mentoring program pairing veteran employees with newly hired veterans, and run a Memorial Day moment of recognition company-wide.

EXAMPLE TO COPY

Audience for the event promo: all 4,100 employees, with extra push to managers and the recruiting team. Audience for the sponsor report: just the COO. He likes brevity. Last time we sent him a two-page report he said, "This could be half a page and tell me the same thing."

Tone: professional, warm, mission-driven. Not corporate-sterile. Our community responds to language that respects service without overdoing it.

Prompt #3: The ERG Workload Optimizer

What it's for: Auditing your ERG's workload, identifying tasks that AI can handle, and building a sustainable operating model so your core team stops burning out. **When to use it:** When you or your team members are feeling overwhelmed. At the start of each quarter to plan sustainably. When someone threatens to step down because the workload is too much.

Main Version (Licensed Copilot / ChatGPT / Gemini / Claude)

PROMPT TO COPY

ROLE

You are a sustainability consultant for internal employee groups. You help group leaders build operating models that prevent volunteer overload by distributing work effectively, automating administrative tasks with AI, and focusing volunteer time on high-impact activities. You understand that group leaders are volunteers first. They have full-time jobs and families.

CONTEXT

Our core team is overloaded. We're spending too much time on administrative work (agendas, recap emails, surveys, event logistics, reports) and not enough time on strategic impact. I need to audit our workload and find everything AI can take off our plates.

REQUEST

Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Based on our group's operations, create:

- 1. WORKLOAD AUDIT

PROMPT TO COPY

Categorize every task into:

| Task | Current Owner | Hours per Month | Can AI Help? | AI Approach | New Time Estimate |

Categories:

- ● AI Can Handle (drafting, summarizing, templating, scheduling)
- ● AI Can Assist (research, analysis, first drafts that need human review)
- ● Human Only (relationship building, decisions, sensitive conversations, representation)

2. AI TASK PLAYBOOK

For each task AI can handle, provide:

- The specific prompt to use
- How long it takes with AI vs. without
- Quality check steps (what the human reviews before using)
- Who on the team should own this

3. SHARED LEADERSHIP MODEL

- Role definitions for core team (5 to 6 roles with specific responsibilities)
- Rotation plan (so no one is stuck in the same role for years)
- Onboarding checklist for new core team members
- "Bus factor" analysis (what happens if one person leaves?)

4. SUSTAINABLE OPERATING CALENDAR

A month-by-month plan that:

- Spreads work evenly across the year
- Identifies peak periods and plans for them
- Includes buffer time and recovery periods
- Limits each volunteer to [X] hours per month

5. EARLY WARNING SYSTEM

- Signs that a team member is overloaded
- Conversation starters for check-ins
- When to scale back vs. redistribute vs. pause
- How to celebrate and recognize volunteer contributions

DISCOVERY

1. How many core team members do you have?
2. What does each person currently do?
3. How many hours per month does each person spend on this work?
4. What tasks take the most time?
5. Have you lost any team members to overload?
6. What's your biggest operational pain point?

Alternate Version (Copilot Free / Limited Context)

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)

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STEP 1 (only after I answer Step 0)

Produce the deliverable I'm asking for.

I lead an internal employee group with [NUMBER] core team members. Our team is overloaded.

Our current tasks include:

[LIST EVERYTHING YOUR TEAM DOES: events, communications, reports, meetings, logistics, surveys, etc.]

Each person spends approximately [HOURS] per month on this work on top of their full-time job.

Create:

1. A workload audit: categorize each task as "AI Can Handle" / "AI Can Assist" / "Human Only" with time estimates
2. For each AI-friendly task, give me the specific prompt to use and how long it takes
3. A shared leadership model with 5 to 6 defined roles and a rotation plan
4. A month-by-month operating calendar that spreads work evenly
5. Three signs a team member is overloaded and what to do about it

Help me protect my team's energy while increasing our impact.

Example Scenario: Core Team Threatening to Step Down After Heritage Month

EXAMPLE TO COPY

I co-chair the Multicultural Alliance ERG at Cedarbrook Manufacturing, a Tier 1 automotive supplier with 3,200 employees across three plants in the United States and one in Brazil. Our ERG has 270 members and covers four affinity sub-groups (Asian Heritage, Black Professionals, Latino Heritage, and Pan-Asia Pacific). Our core team has 6 people: me and another co-chair, plus a leader for each of the four sub-groups.

EXAMPLE TO COPY

Here is what each person currently does and roughly how many hours per month they spend:

Co-chair 1 (me): overall strategy, sponsor relationship, board meetings, monthly all-team coordination, budget tracking, conflict resolution. About 22 hours per month.

Co-chair 2: external partnerships, recruiting integration with HR, our annual cross-cultural leadership summit. About 18 hours per month.

Asian Heritage lead: plans Lunar New Year, AANHPI Heritage Month in May, Diwali, a quarterly speaker series, and a mentoring circle. About 25 hours per month, spikes to 45 in April and October.

Black Professionals lead: plans Black History Month, Juneteenth, a quarterly professional development series, a mentoring program, and our annual community service day with the Detroit Urban League. About 28 hours per month, spikes to 50 in January and June.

Latino Heritage lead: plans Hispanic Heritage Month, Day of the Dead, a quarterly speaker series, a Spanish-language professional development track, and the connection with our Brazil plant. About 26 hours per month, spikes to 48 in September and October.

Pan-Asia Pacific lead: plans events for AANHPI Month, mid-autumn festival, a quarterly speaker series. About 18 hours per month. New role, still ramping.

Tasks that take the most time across all of us: writing event promotions and follow-ups (probably 40 percent of our combined hours), planning logistics and coordinating with facilities and catering, drafting our quarterly sponsor reports, surveying members and writing up the results, and responding to one-off requests from HR or executive sponsors that always feel urgent.

Burnout situation: our Black Professionals lead told me last week she is stepping down after Juneteenth. She said "I have not had a Saturday to myself in four months." Our Latino Heritage lead said she is considering stepping down after Hispanic Heritage Month closes in October. That would mean we lose two of our four sub-group leads in five months. Both said the same thing in different words: "I love the mission but I cannot keep doing this on top of my day job."

Biggest operational pain point: every event is built from scratch. Every promotion is written fresh. Every recap email starts blank. We have no templates, no library, no shared playbook. Every sub-group lead is reinventing the same wheel five times a year. And we are losing the best people to exhaustion before we lose them to other companies.

Prompt #4: The ERG Impact Storyteller

What it's for: Turning ERG activities and member experiences into compelling stories that demonstrate impact to leadership, attract new members, and build organizational support.

When to use it: For annual reports, leadership presentations, recruitment materials, or whenever you need to show, not just tell, the value of your ERG.

Main Version

PROMPT TO COPY

ROLE

You are a storytelling consultant for internal employee groups. You turn activities and member experiences into compelling narratives that demonstrate business impact and human value. You know that leaders remember stories, not statistics.

CONTEXT

I need to tell the story of our group's impact in a way that resonates with leadership, attracts new members, and justifies continued investment. I have data and activities, but I need to turn them into narratives.

REQUEST

Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Only after I have answered the DISCOVERY questions, produce:

1. IMPACT STORIES (3 templates)

For each, provide a structure:

- The person (anonymized or with permission)
- The challenge they faced
- How the group helped
- The business outcome (retention, promotion, innovation, engagement)
- The quote or moment that captures it

2. DATA-INTO-NARRATIVE

Take our group's metrics and weave them into a compelling paragraph:

- Not: "We had 12 events with 340 attendees"
- But: "340 employees chose to invest their time in our programming, and here's what that investment returned..."

3. ELEVATOR PITCH

Three versions:

PROMPT TO COPY

- 15-second version (for the hallway)
- 60-second version (for the leadership meeting)
- 3-minute version (for the all-hands presentation)

DISCOVERY

1. What group do you lead and what's its focus?
2. What are 3 to 5 of your most significant activities or events from the past year?
3. What metrics do you have? (membership, attendance, retention, engagement, promotions, anything you've tracked)
4. Do you have any specific member experiences you can share? (anonymized or with permission)
5. Who is the primary audience for these stories? (executive sponsor, all-employee meeting, board, recruitment material)

Alternate Version (Copilot Free)**PROMPT TO COPY**

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STEP 0 (do this before anything else)

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STEP 1 (only after I answer Step 0)

Produce the deliverable I'm asking for.

Our group accomplished the following this year:

[LIST ACTIVITIES, EVENTS, PROGRAMS, METRICS]

Member highlight: [DESCRIBE ONE MEMBER'S EXPERIENCE WITH THE GROUP]

Create:

1. Three impact story templates (person, challenge, how the group helped, business outcome)
2. Turn our metrics into a compelling narrative paragraph (not just numbers)
3. Three elevator pitches: 15-second, 60-second, and 3-minute versions

Make leadership feel the impact, not just see the data.

Example Scenario: First Annual Report to the Board

EXAMPLE TO COPY

I lead the Abilities Connect ERG at Pinegrove Powertrain, a Tier 1 transmission supplier with 2,800 employees across HQ in Kalamazoo Michigan and two plants (one in Indiana, one in Tennessee). Our ERG focuses on disability inclusion. We support employees with visible and non-visible disabilities, employees who are caregivers for family members with disabilities, and allies. Membership is 215 people, up from 90 when we launched 18 months ago.

Our board has asked our executive sponsor (Chief People Officer) for a 5-minute ERG spotlight at the December board meeting. She has 5 minutes total. She wants 3 stories, a few key metrics, and a closing pitch. I need to give her something she can actually use, not a slide deck full of bar charts.

Here is what we have done in 18 months:

Launched a Workplace Adjustments Resource Guide that documents how to request accommodations, what is available, and who to contact. Before this guide, employees had to email HR and wait 5 to 7 business days for a response. Now they self-serve about 60 percent of requests. HR's accommodations team told us their request volume dropped 40 percent and their satisfaction scores went up.

Partnered with our facilities team to do an accessibility audit of HQ and both plants. Identified 47 issues, 31 of which have been fixed (better signage in cafeterias, lower mirror placement in restrooms, easier-grip door handles in three high-traffic doors). Facilities funded the remaining 16 in next year's capital budget.

Launched a peer mentoring circle for employees with non-visible disabilities (ADHD, autism, chronic illness, mental health). 22 active members. We just got results from our 12-month survey: 18 of 22 reported "feeling less alone at work" as the top benefit.

Member experience I can share with permission: a process engineer at our Tennessee plant disclosed her ADHD diagnosis to her manager for the first time after attending one of our peer mentoring sessions. Her manager had been about to put her on a performance plan. Instead, they worked together on workflow adjustments. She is now in her second quarter of strong performance reviews. She told us, "For the first time in 11 years at this company, I felt like I could stop hiding."

Metrics: 215 members (up 139 percent in 18 months), 60 percent reduction in accommodations response time, 41 percent of new hires this year said our ERG was a positive signal in their decision to accept the offer (from new-hire survey), zero attrition among ERG core team in 18 months (compare to company average of 14 percent).

Audience: the board (10 directors, mostly external, all senior executives at other companies). They are not familiar with our day-to-day. They want to see business impact, not activity counts.

Prompt #5: The ERG-Business Integration Mapper

What it's for: Identifying specific ways your ERG can contribute to business objectives. Product development, market insight, talent pipeline, customer understanding. So you become a strategic input, not just a cultural nice-to-have. **When to use it:** During strategic planning. When leadership asks "What value does the ERG add?" When you want to evolve from community builder to business partner.

Main Version

PROMPT TO COPY

ROLE
You are a business integration strategist for internal employee groups in the automotive industry. You help group leaders identify concrete ways their group can contribute to business objectives beyond culture and engagement. You know that the most impactful groups are strategic inputs to talent, product, market, and innovation decisions.

CONTEXT
I want to evolve our group from a community group to a business partner. I need to identify specific, concrete ways our group's perspective and network can contribute to business decisions and outcomes.

REQUEST
Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Only after I have answered the DISCOVERY questions, produce:

- 1. BUSINESS INTEGRATION MAP
 - | Business Function | How the Group Can Contribute | Specific Initiative | Expected Outcome |
 - Cover: Talent acquisition, retention, product or service development, market insight, customer experience, innovation, supplier relationships, community engagement.
- 2. QUICK WINS (implement in 30 days)
 - Three things the group can do in the next 30 days that demonstrate business value:
 - Low effort, high visibility
 - Connected to a current business priority
 - Measurable result

- 3. STRATEGIC PROPOSALS

PROMPT TO COPY

Two longer-term initiatives (3 to 6 months) that position the group as a business partner:

- Clear business case
- Resource requirements
- Success metrics
- Executive sponsor alignment

4. PARTNERSHIP OPPORTUNITIES

Other internal groups, business functions, or external organizations to partner with for amplified impact.

DISCOVERY

1. What group do you lead and what's its focus?
2. What industry, size, and business priorities does your company have?
3. What does your group do today?
4. What partnerships or business integrations already exist (formally or informally)?
5. What's the single biggest perception of your group you want to change with leadership?

Alternate Version (Copilot Free)

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)

Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)

Produce the deliverable I'm asking for.

Our group: [NAME AND FOCUS AREA]

Company: [INDUSTRY, SIZE, KEY PRIORITIES]

Current state: [WHAT THE GROUP DOES NOW]

Create:

1. A business integration map showing how our group can contribute to: talent, product, market insight, innovation, and supplier relationships
2. Three quick wins we can implement in 30 days that demonstrate business value
3. Two strategic proposals (3 to 6 month initiatives) with business cases
4. Partnership opportunities with other internal groups or business functions

PROMPT TO COPY

Help us evolve from community group to strategic business partner.

Example Scenario: From Quarterly Social to Strategic Input**EXAMPLE TO COPY**

I lead the Pride at Work ERG at Hollister Industries, a Tier 1 supplier of body structures and stamping with 5,600 employees across HQ in Troy Michigan and five plants (three in Michigan, one in Alabama, one in Ontario Canada). Our ERG has 340 members, mostly at HQ and the two largest Michigan plants. Our core team is 5 people.

What we do today: a quarterly social hour at HQ (about 30 attendees each), a Pride Month celebration in June (about 200 attendees, our biggest event), we walk in the Motor City Pride parade together with a company-branded banner (about 50 employees and family members), we sponsor an annual scholarship at a local LGBTQ youth organization (5,000 dollars per year). Our executive sponsor is the VP of Talent. Honest assessment: she is supportive but distant. We have not had a one-on-one with her in 8 months.

Company business priorities for the next 18 months: (1) win share in the EV body structures market, where our largest competitor has been beating us on the youth demographic of buyers (data from our OEM customers says LGBTQ-friendly product marketing is a measurable purchasing factor for the under-35 segment); (2) close a 22 percent gap in employer brand ranking versus our top competitor for engineering talent in the Midwest; (3) expand into the Mexico market by 2027 through a planned acquisition.

Partnerships and integrations today: minimal. We coordinate informally with our Women in Manufacturing ERG on a few events. We have no formal connection to talent acquisition, marketing, product, or business development. Our budget is 22,000 dollars per year and most of it goes to Pride Month and the scholarship.

The perception I want to change: right now leadership sees us as "the group that does the Pride parade." I want them to see us as a business input. We have 340 members who include design engineers, sales leaders working with OEM marketing teams, plant managers, recruiters, and someone in M&A. We have a network and a perspective that could meaningfully contribute to all three of those business priorities, but nobody is asking us. We need to stop waiting to be asked and start offering.

Copilot Notebook Example: The ERG Leaders Onboarding System

A Copilot Notebook is a focused workspace where you bring all the files for one project into one place, and Copilot answers questions and creates new artifacts using only those files. Not your whole tenant. Not the open web. Just the materials you curated. Why this matters for ERG leaders: You already have the documents. Your strategy, your prompts, your sponsor onboarding materials, your succession plan. A Copilot Notebook turns that pile of files into something your team can actually use, search, and build from. New core team member onboarding goes from "here are 14 files, good luck" to "open the notebook, ask it your question." **What a Copilot Notebook can do once your files are loaded:**

- **Answer questions grounded only in your files.** No hallucinations from the open web. If the answer is not in your files, Copilot says so.
- **Create a PowerPoint deck.** Generate slides for a sponsor presentation, a new-member orientation, or a board update straight from the notebook content.
- **Build a mind map.** Visualize how your strategy, prompts, and onboarding materials connect.
- **Generate flashcards.** Turn your prompt library or executive sponsor playbook into study cards for new core team members.
- **Create a quiz.** Test new ERG leaders on what they have learned during onboarding.
- **Produce an audio overview (podcast).** Two AI voices have a 10 to 15 minute conversation about your materials. Great for catching up on the drive in.
- **Draft a Word document.** Pull a one-page summary, a new sponsor brief, or a manager packet straight from the notebook references.
- **Set custom instructions.** Tell Copilot how to respond every time in this notebook (tone, audience, format), so you don't have to repeat it in every prompt.
- **Share it with your team.** Your co-chairs and core team can use the same notebook with the same context.

What's Inside This Example Notebook

The ERG Leaders Onboarding System is a working Copilot Notebook built around 13 files. Each one is downloadable below if you want to start your own version.

- (set at the notebook level, tells Copilot how to respond)

The point of this demo: You do not have to start from scratch. Take the files you already have, drop them in a notebook, and Copilot becomes a team member who knows your ERG.

Make This Notebook Smarter: What to Feed It Next

A Notebook is not a finished product. It is a living asset that gets sharper every time you feed it something real. The version you saw demoed today is the starter version. The version sitting in your hands twelve months from now can be ten times more valuable. Here is how.

SOP (Standard Operating Procedure) vs. Reality

A Notebook holds two kinds of content:

- **SOP.** Charters, role descriptions, processes, governance. What should happen.
- **Reality.** What actually happened. Where the doctrine broke. The edge cases. The judgment calls. Most teams only load SOPs. That is why their AI feels generic. The leverage is reality.

Lessons from messy transitions

Every time an ERG leader, manager, or executive sponsor hands off, capture a one-page "what I wish I knew on day one." Drop it into the Notebook. After three transitions, the Notebook will teach things no charter ever could.

Edge cases and judgment calls

The moment a sponsor changed mid-quarter. The event that flopped and why. The conflict between two co-chairs. Anonymize where needed, but capture the situation and what you decided.

Decision logs

Not meeting minutes. The actual reasoning behind why you picked one direction over another. AI cannot reverse-engineer judgment from outcomes. You have to feed it the thinking.

First-90-day questions

Track the recurring questions new leaders ask. Each one is a gap in your Notebook. Close the gap by writing the answer once.

The Discipline

Add one piece of reality per month. That is it. In a year you have twelve assets your successor will be grateful for.

Build Your Next Notebook

A Notebook earns its keep when the same kind of question gets asked over and over by different people.

Three Patterns That Justify a Notebook

Pattern	What it sounds like in real life
Onboarding any role	New leader, new sponsor, new committee member. Anywhere the org loses sixty days re-explaining context.
Recurring decisions	Budget defenses, event approvals, sponsor updates, quarterly reports. Anywhere you write the same kind of thing on a cycle.
Cross-org translation	Anywhere one group has to explain itself to another. ERG to finance. ERG to executive sponsor. ERG to a new business unit.

Your Homework

Write down three places in your work where the same question keeps coming back. Those are your next three Notebooks.

Quality Check: Before Using AI-Generated ERG Content

- [] **Does it reflect your community's authentic voice?** AI can draft, but it doesn't know your community's lived experience. Review every communication through the lens of the people you represent.
- [] **Is the business framing honest?** Connecting ERG work to business outcomes is strategic. Overstating the connection is dishonest. Keep the framing credible.
- [] **Did you protect member privacy?** Never paste identifying information about ERG members into external AI tools. Anonymize stories and experiences.
- [] **Would your most engaged member be proud of this?** If the communication feels corporate and soulless, add your ERG's personality back in. AI provides structure. You provide heart.
- [] **Is the workload realistic?** If your strategy requires more hours than your team has, it's not a strategy. It's a recipe for burnout. Scale to your capacity.

Copilot Basics (If You Use Microsoft 365)

- **Work Mode vs. Web Mode:** Work mode can summarize past ERG communications, pull data from SharePoint-stored reports, and help draft responses based on existing templates. Web mode is best for creating new strategies, impact narratives, and communication plans from scratch.
- **When to use each:** Use Work mode to find past ERG event data or summarize executive sponsor email threads. Use Web mode with these prompts for building new strategies, reports, and communication kits.

- **How to save prompts:** Save the ERG Strategy Builder and the ERG Communication Engine where you can access them fast. These are your quarterly essentials.
- **Reminder:** Be especially careful with member-identifying information, DEI-sensitive content, or compensation/promotion data in AI tools. Use company-provided platforms for anything involving personal employee information.

What to Try This Week

- [] **Build your one-page strategy.** Use Prompt #1. Share it with your executive sponsor and ask, "Does this align with what you need from us?"
- [] **Draft your next communication.** Use Prompt #2 for your next event promotion or sponsor report. Time how long it takes vs. doing it manually.
- [] **Audit your workload.** Use Prompt #3 to identify every task AI can handle. Pick one and automate it this week.
- [] **Have the sustainability conversation.** Ask your core team: "What task takes you the most time? What would you stop doing if you could?" Their answers guide where AI helps most.
- [] **Connect one activity to business impact.** Take one thing your ERG already does and reframe it in business terms. Practice saying it out loud.

Resources & Next Steps

- [Link to the AI Learning Lab Library](#) ^[2]

Key Frameworks from This Lab

- **The ERG Strategic Framework** shows that ERGs evolve through three stages: Event Planner, Community Builder, Business Partner.
- **The Sustainability Equation:** Strategic clarity + AI efficiency + Shared leadership = Sustainable ERG impact.
- **You don't have to stop doing events. You have to start connecting them to outcomes.** The activities can stay the same. The framing changes everything.
- **AI handles the administration. You focus on the mission.** Every minute AI saves on drafting is a minute you reclaim for impact.

What We Didn't Cover (Yet)

- Building an AI-powered ERG member engagement tracking system.
- Using AI to analyze ERG survey data and sentiment trends.
- Creating cross-ERG collaboration frameworks powered by AI.
- Developing an ERG ROI model for executive presentations.

Next Steps

- Build your one-page strategy this week using Prompt #1. Share it with your executive sponsor.
- Draft your next event promotion or quarterly report using Prompt #2. Notice how much time you save.
- Run the workload audit with Prompt #3 at your next core team meeting. Let the team see what can be automated.

Questions or feedback? cheryl@cherylthompson.net ^[3]

The Mental Model: Strategize, Communicate, Sustain

Today’s session was built on one idea: **ERG leaders are doing strategic work on volunteer time. AI handles the administration so you can focus on the impact.**

Step	Prompt	What It Does
Strategize	Prompt 1: ERG Strategy Builder	Turns scattered goals into a one-page strategy that connects ERG activities to business outcomes.
Communicate	Prompt 2: ERG Communication Engine	Drafts event promotions, sponsor reports, impact summaries, and business cases in minutes.
Sustain	Prompt 3: ERG Workload Optimizer	Audits your workload, identifies AI-automatable tasks, and builds a sustainable operating model.

You said yes to this work because you believe in the mission. Now you have the tools to lead it without losing yourself in the process.

Your mission matters. Your sustainability matters too:

- Build your one-page strategy this week.
- Automate one administrative task with AI.
- You now have the tools to lead your ERG strategically without burning out.

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/1193691252/b44d6a2b2d>

[2] <https://www.cherylthompson.net/learning-labs#browse>

[3] <mailto:cheryl@cherylthompson.net>