

“Leveraging AI to Enhance Effectiveness in Administration, Analytics, and Leadership” Webinar

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Speakers



Natalya Maisel, PhD

Division Manager, Division of Clinical Informatics and Digital Transformation (DoC-IT)
University of California, San Francisco Department of Medicine



Jon Rueter, MBA

Associate Dean for Financial Affairs
University of California, San Francisco, School of Medicine



Aaron Tabacco, PhD

Director of Staff Experience
University of California, San Francisco Department of Medicine



University of California
San Francisco

Challenges and Successes in Building DOMINIQ: An AI Chatbot for Administrative Support

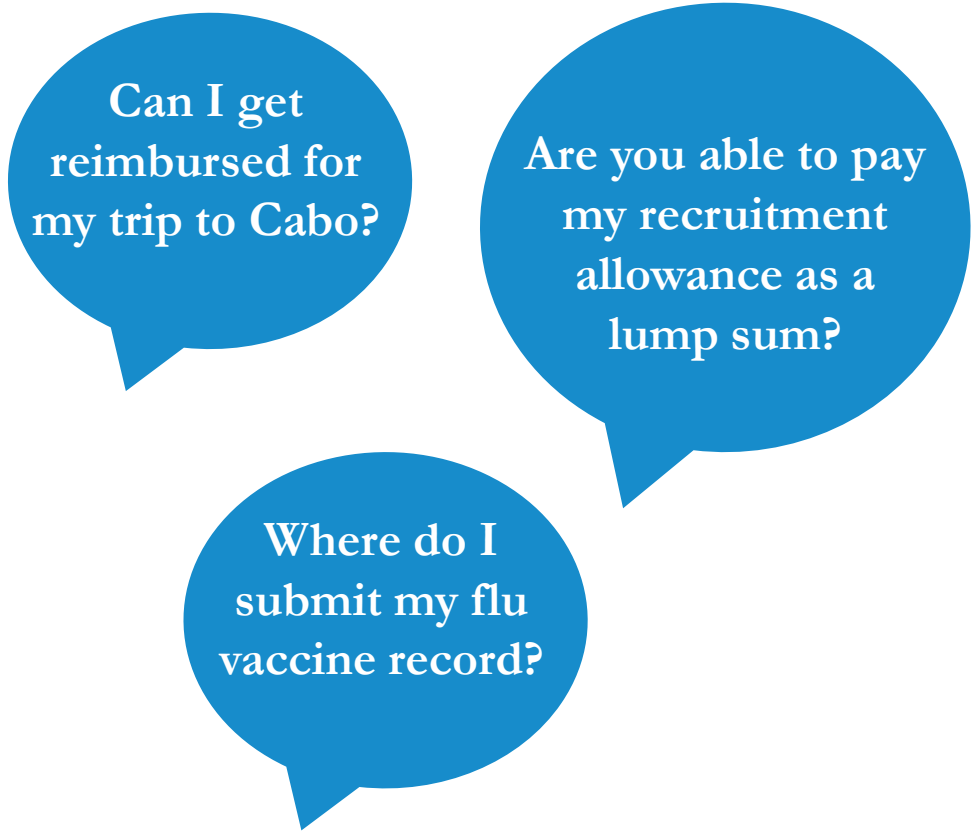
Department of Medicine's Interactive Navigator for Inquiries and Queries

Natalya Maisel



Too Many Questions, Too Little Time

- Navigating complex policies at large academic medical centers is a daily challenge.
- Administrators are frequently inundated with questions from staff, faculty, and trainees.
- This creates inefficiencies and adds to administrative burden.
- Our goal was to make an AI chatbot assistant that could provide employees with a self-service trusted, quick reference tool.



Can I get
reimbursed for
my trip to Cabo?

Are you able to pay
my recruitment
allowance as a
lump sum?

Where do I
submit my flu
vaccine record?

DOMINIQ: DOM's AI Assistant

Scope of DOMINIQ:

- Academic Affairs
- Education
- General Admin
- HR
- Finance
- IT
- Legal & Compliance
- Procurement & Reimbursement
- Research Administration



Department of Medicine's Interactive Navigator for Inquiries and Queries

DOMINIQ: DOM's AI Assistant

- Instead of searching the entire internet, DOMINIQ only searches the documents and website links that we loaded into the model → helps to ensure integrity of information
- Each answer includes a link to the URL or PDF used to create the response → allowing users to evaluate the original source materials themselves
- It is hosted on UCSF's secure internal Versa platform → ensures safe and secure use



Greetings, Sara! Welcome. I'm here to help with your questions. Please keep in mind:

- My answers may not always be accurate, so please verify the information independently.
- If I don't provide a response, try rephrasing your question and asking again.
- If my response isn't helpful, click the thumbs down to provide feedback and help me improve. Thank you!

Enter your question. (Shift + Enter for new line)



Greetings, Sara! Welcome. I'm here to help with your questions. Please keep in mind:

- My answers may not always be accurate, so please verify the information independently.
- If I don't provide a response, try rephrasing your question and asking again.
- If my response isn't helpful, click the thumbs down to provide feedback and help me improve. Thank you!

What is the 95% rule for faculty?

The 95% rule for faculty at UCSF states that a maximum of 95% of a faculty member's salary may be charged to extramurally sponsored projects. This rule is in place to ensure that faculty members allocate at least 5% of their effort to non-research activities such as teaching, university service, and administrative work. Exceptions to this rule can be granted by the Vice Chancellor of Academic Affairs under unusual circumstances, provided that the Department Chair verifies in writing that the faculty member's non-research activities will be reduced accordingly.

Cited Sources:
<https://osr.ucsf.edu/academic-senate-95-rule>



Which types of activities must be supported by non-sponsored funds instead of federal grants?

Under the 95% rule for faculty at UCSF, the following types of activities must be supported by non-sponsored funds instead of federal grants:

- Teaching
- Preparation of new or competing proposals (unless current funding allows it, such as a K award)
- University and public service (including institutional gover

Enter your question. (Shift + Enter for new line)

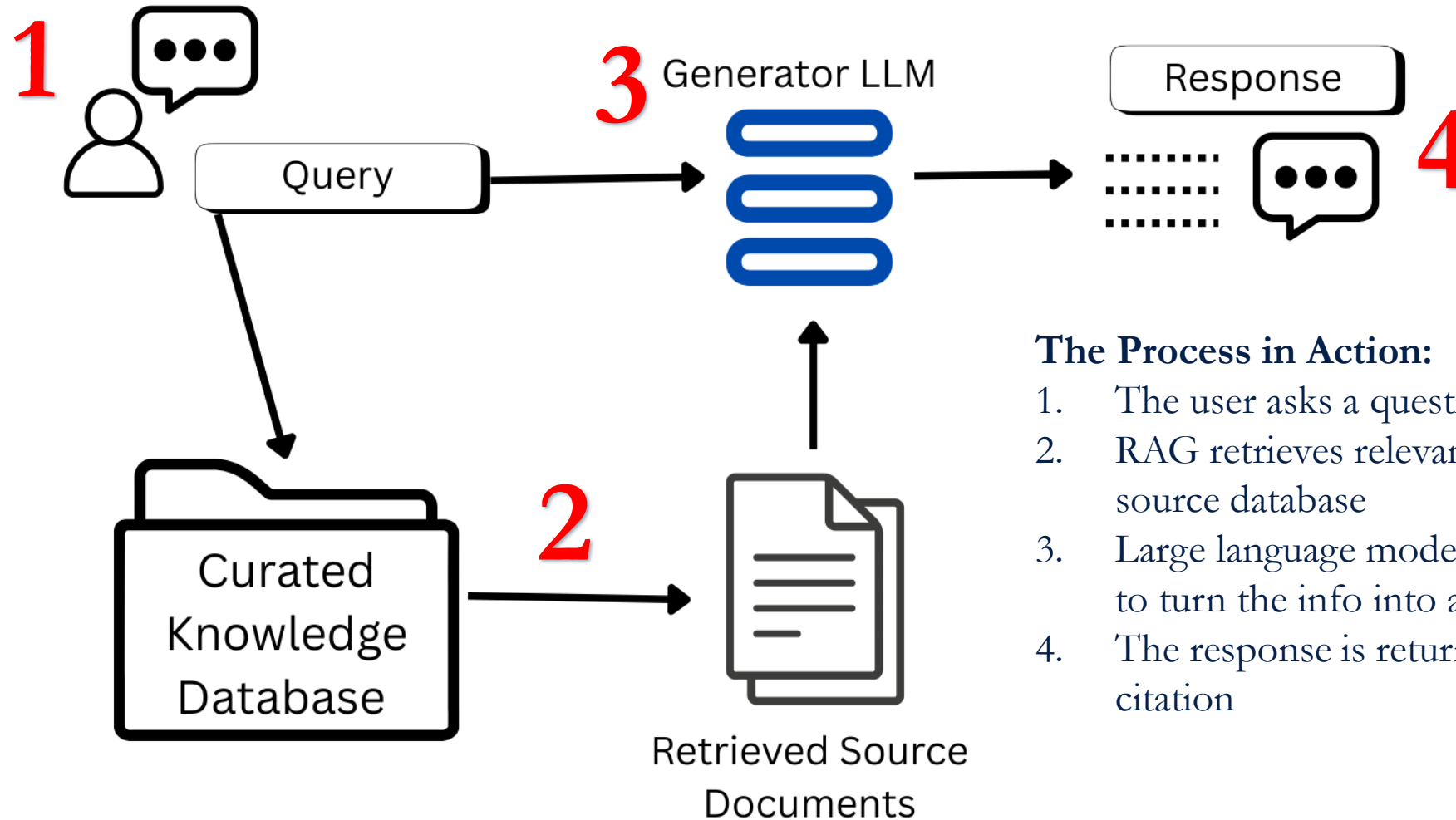
Disclaimer: AI responses may contain inaccurate information. Verify answers independently.

How does DOMINIQ work?



- DOMINIQ uses Retrieval Augmented Generation (RAG)
- Unlike general AI tools, RAG draws solely from our curated knowledge database – in our case, about 10,000 website links and PDFs

How does DOMINIQ work?



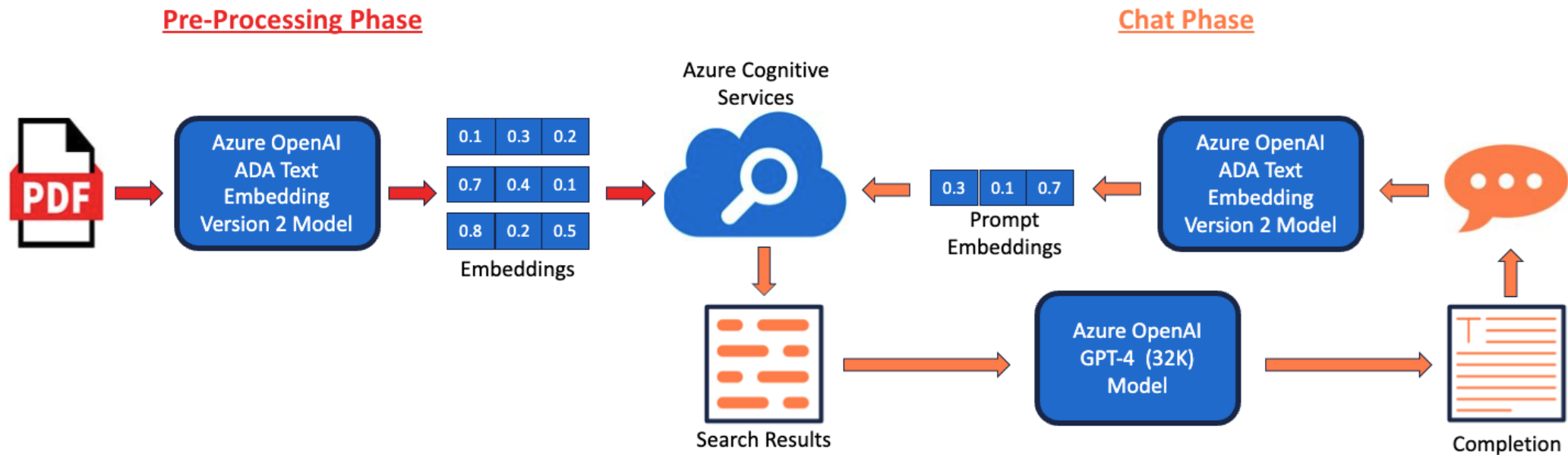
The Process in Action:

1. The user asks a question
2. RAG retrieves relevant info from the source database
3. Large language models (LLMs) are used to turn the info into a full response
4. The response is returned along with the citation

How does DOMINIQ work?

UCSF's IT team uses Microsoft Azure to create all their Chat Assistants

- Mostly “off-the-shelf” from Microsoft which makes it easier to implement
- Less customization is possible



How did we get the resources?

Collaborated with subject matter experts (SMEs) across divisions to identify high-priority policy and procedure resources and test questions.

Phase 1: Creating the Knowledge Base



Surveyed **30+ SMEs**
who identified their top
850 most-used resources
at UCSF

Our team identified over
160 relevant websites
across all targeted areas

We utilized sitemaps and
web scraping to identify all
the URLs within the
websites

Phases 2 & 3: Extensive Testing and Refinement

SMEs tested **1,000** queries

Assessed response **accuracy & identified gaps**

Added **350** new resources

Expanded to **40+** staff

Tested **400 new queries (a total of 1,400 queries)** for accuracy & identified gaps

Refined database

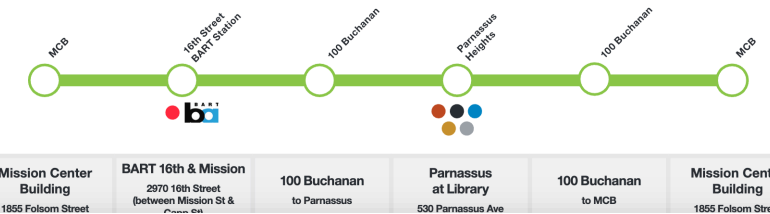
Verified Database of 10,000 Resources

URL Domain	Links within Domain
https://meded.ucsf.edu	967
https://controller.ucsf.edu	788
https://campusliveserviceshome.ucsf.edu	624
https://it.ucsf.edu	504
https://supplychain.ucsf.edu	419
https://hr.ucsf.edu	375
https://facultyacademicaffairs.ucsf.edu	340
https://policy.ucop.edu	319
https://career.ucsf.edu	238
https://www.ucop.edu	219
https://irb.ucsf.edu	189
https://policies.ucsf.edu	177
https://ucsfhealthcardiology.ucsf.edu	171
https://ctsi.ucsf.edu	148
https://ucop.edu	141
https://brm.ucsf.edu	127
https://medicine.ucsf.edu	126
https://geriatrics.ucsf.edu	125
https://compliance.ucsf.edu	124
https://ucsfhealthhospitalmedicine.ucsf.edu	124
https://medschool.ucsf.edu	114

164 website domains that provided 9,850 URLs

172 PDFs

LIME Shuttle Schedule



Know Do Share

UCSF Health

Masking Requirement in Direct Patient Care Areas

October 23, 2024

Know

- A systemwide **masking requirement will resume from November 1, 2024, through April 30, 2025**, for all staff in areas where direct patient care is provided.
- This decision **aligns with public health guidelines** due to heightened respiratory viral season risks.
- Applies to areas of direct patient care: hallway beds, infusion centers, hospital & clinic.

Funding Entry Using 19xx State Sources for Salary Support

UCPath

UCSF guidelines restrict the use of state sources for salary support above Scale 0 for Health Sciences Compensation Plan (HSCP) faculty. UCPath does not currently provide warning or error messages to enforce this restriction, and departments are responsible for ensuring that funding entry is correct and allowable at the time of funding entry and approval.

This job aid addresses two common scenarios for handling funding distributions for state support. If you have questions about interpreting funding guidelines, contact your control point.

Entering or Updating Funding for HCOMP Faculty Supported by 19xx State Sources

Lessons Learned

- **Prompt Sensitivity:** Small changes in phrasing can lead to varied results, stressing the importance of precise inputs.

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- **Prompt Sensitivity:** Small changes in phrasing can lead to varied results, stressing the importance of precise inputs.



Assistants ⓘ

Large Language Model ⓘ

Sample Questions

DOMINIQ

GPT-4o

What steps are required to initiate a new faculty recruitment?

New Chat +



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- If my response isn't helpful, click the thumbs down to provide feedback and help me improve. Thank you!



Can I charge brokerage fees for moving expenses?



No, brokerage fees are not listed as reimbursable moving expenses under UC Policy G-13.

Cited Sources:

<https://policy.ucop.edu/doc/3420347/BFB-G-13.pdf>



Refine Prompt



Can I charge brokerage commission for moving expenses?



Yes, you can charge brokerage commission for moving expenses related to the sale of your former primary residence. The University of California may reimburse actual and reasonable selling costs directly associated with the sale, including brokerage commission, not to exceed 3% of the final sales price or \$30,000, whichever is less.

Cited Sources:

<https://policy.ucop.edu/doc/3420347/BFB-G-13.pdf>



Lessons Learned

- **Prompt Sensitivity:** Small changes in phrasing can lead to varied results, stressing the importance of precise inputs.
- **Limitations of RAG:** The technology is not as sophisticated as we had hoped. Hard for the model to answer complex questions.
- **Resource Limitations:** DOMINIQ relies on curated resources, limiting its scope compared to broader AI systems; regular updates are needed.
- **Documentation Gaps:** Lack of accessible, updated policy details on UCSF websites highlights the need for a centralized knowledge management system.

Next Steps

Evaluate the tradeoffs

- Do the current limitations (e.g., accuracy, maintenance burden, scope) outweigh the potential benefits of implementing this tool?

Develop a sustainable maintenance plan

- Who will be responsible for keeping the chatbot's content accurate and up to date?
- What processes or infrastructure will ensure timely updates as policies or information change?

Focus on improvements before wider dissemination

- Test a more limited-scope chatbot to see if we can hit accuracy targets.
- Explore ways to improve the RAG technology, such as tagging the source documents.
- Determine who would benefit most, even if it remains imperfect.
- Continue to explore enterprise-wide solutions, such as a policy chatbot at the university-level.



University of California
San Francisco

AI in Action: Streamlining Administration and Finance in a School or Department

Jon Rueter, MBA

Associate Dean for Financial Affairs

UCSF School of Medicine



Administration and Finance Working at an Academic Medical Center Can Sometimes Feel Like...



- Many manual processes, some involving manually copy and pasting information from PDF files before the “real” work can begin.
- Recurring tasks involving going to a reporting system, downloading reports, manipulating data, making inferences, and then emailing someone or taking additional action.

First Order Use Cases for GenAI

Start here on journey to become AI first team or organization

Help composing/editing emails – especially the tricky ones.

Decision or high-stakes conversation sounding board

Preparing to lead meetings – plan agendas, draft bullets, generate discussion prompts, etc.

Excel formulas and light data editing (e.g., take a list of names as Last, First and change to First Last or change from ascending to descending, etc.)

Technology guru – “explain GenAI concepts to me”, “here is a monthly process – please provide suggestions for streamlining”, “help me write a SQL query to answer a question about our federal funding exposure”



Organizations need secure, IT security-sanctioned ways to use GenAI and those tools should not be neutered or watered down to the extent possible.

General Advice

Select problems not addressed by your ERP

Focus on your own tasks and problems first; department vs. central office

Use GenAI as coding assistant and solutions architect

Lead by example, invest in learning and then train and inspire your teams - i.e., AI/coding cohorts

Always human in the loop by design; look for opportunities to reduce cognitive load



Be specific. Specify Cell References and Format



Engine

Assistants ⓘ

Large Language Model

Sample Questions

Azure OpenAI ▾

OpenAI Web ▾

GPT-3.5 Turbo ▾

Tell me about UCSF ▾

New Chat



Greetings Jon! I'm Versa, how may I help you today?



Hello Versa, I need an excel formula to tell me if the date value in a cell falls within the range of 7/1/22-6/30/23. The first value in my excel file is in X2 and the values in that field are formatted as dates.



Hello! I can help you with that. To determine if a date falls within a specific range in Excel, you can use the following formula:

`=AND(X2>=DATE(2022,7,1), X2<=DATE(2023,6,30))`

This formula uses the **AND** function to check if two conditions are met:

1. **`X2>=DATE(2022,7,1)`**: This checks if the date in cell X2 is greater than or equal to July 1, 2022.
2. **`X2<=DATE(2023,6,30)`**: This checks if the date in cell X2 is less than or equal to June 30, 2023.

If both conditions are true, the **AND** function will return **TRUE**, indicating that the date falls within the specified range. Otherwise, it will return **FALSE**.

You can enter this formula in a different cell and copy it down to apply it to multiple cells in the column.

Let me know if you need any further assistance!





- A term coined in February 2025 by OpenAI co-founder Andrej Karpathy.
- "Vibe coding" is building an app or program by describing what you want in plain English to an AI assistant, instead of writing lines of code yourself. The "vibe" refers to focusing on the creative idea and desired outcome, while the AI handles the technical implementation.
- Traditional programming and software development tools (such as Python and SQL) can accelerate your productivity if you deal with data in your role, especially recurring analyses or recurring tasks involving data.
- Python is an open-source programming language used in a wide variety of fields such as data science, tech, finance, healthcare and research. It is commonly used for data analysis, automation, web development, and scientific computing.
- Python is free to use and boasts powerful libraries specifically for data analysis, processing and manipulation (numeric or text).

- An emerging term attributed to Perplexity CEO Aravind Srinivas in July 2025, which refers to ‘**agentic**’ browsing, i.e., using an AI agent to complete tasks on web applications.
- The quintessential use case that gets thrown around all the time is making dinner reservations.
- Examples of AI-assisted browsers* include:
 - Perplexity’s Comet, The Browser Company’s Dia, Google’s Project Mariner, OpenAI’s Operator
- Competition is fierce in this space, which is rapidly evolving. Business applications abound – think filling out webforms such as financial journals – essentially *automating any click and data entry process using web applications*.

***Be sure to heed privacy concerns with 3rd party AI systems.**



Current Use Cases

- Compare department + medical center agreements (PDF utility) to evaluate how they are similar and different, where assessment structure and margin-sharing may/may not be appropriate.
- Survey results analysis and meeting minutes assistant
 - Looks for areas of consensus and variation as well as novel ideas
 - Analyzes results to look for themes based on unit type (e.g., a small biomedical science unit vs. responses from large clinical departments)
 - Pulls interesting quotes, helpful for presenting results.
- Policy or process proposal sounding board – using archetypes (e.g., based on roles and department type)

Research Admin and Clinical Revenue

Use Cases

- NIH Other Support docs – count effort by calendar month year to evaluate where >12 months, review project titles and descriptions and overlap statements to flag potential gaps
- Reconcile clinical trial payments – extracting key fields from sponsor/payor formats into a consistent, structured dataframe and compare to expected payments by event occurrence
- Evaluate a clinical trial protocol against institutional resources to determine ability to participate in trial
- Process large amounts of raw wRVU and target data to create tables by department or faculty group to show progress toward annual wRVU targets

On Policy Chatbots

- Using LLMs to answer policy questions is a very compelling and popular use case.
- A leading practice that can sometimes be overlooked is to use markdown formatting with embedded metadata tags, summaries and hypothetical questions.
- LLMs can help you convert your policy docs to markdown.

```
category: morale events policies
audience: UCSF employees, staff, faculty, event planners, administrators
tags: [employee recognition, morale events, 1:1 meals, reimbursement, department-wide events]
```

1:1 Morale Events

This policy addresses the appropriateness of 1:1 morale events, such as meals for employee recognition. While these events are allowable under certain circumstances, they must meet specific criteria to ensure they are appropriate and justifiable.

Question

Are 1:1 morale (employee recognition) meals allowed?

****Example:**** A lab manager wants to take a lab member out to lunch to recognize their work/contribution to the lab.

Answer

Yes, 1:1 morale meals are allowable, but they must meet the following criteria:

- 1. **Recognition of Noteworthy Contribution:**** The purpose of the meal must be to recognize a significant contribution or achievement by the employee. The recognition should be clearly stated in the expense report or event documentation.
- 2. **Justification for 1:1 Format:**** The reason for holding a 1:1 event, rather than a group or department-wide event, must be explicitly stated. This is to avoid the appearance of two employees simply having lunch together for personal reasons.
- 3. **Consideration of Alternatives:**** In some cases, it may be more appropriate to wait for a larger department-wide event to recognize the employee along with others. This ensures inclusivity and avoids potential misunderstandings.

Finance Assistant Concept

Current State

- At a specified time, go to a website and download a report
- Open report and manipulate data
- Begin analysis, make inferences, draw conclusions
- Make judgement about action needed
- Take action e.g., write email, schedule meeting, prepare cost transfer, etc.

Future State

- Review analysis and inferences
- Make judgement about action needed
- Take action e.g., write email, schedule meeting, prepare cost transfer, etc.

Automate the data gathering and preparation layer to jumpstart decision and action!

General Accounting Finance Assistant

How can I help?

This is the chat window which will display the conversation between the human and the orchestration layer of the assistant. This side of the screen will be scrollable as the conversation continues. The chat window can be used to provide parameters or other details related to a task/workflow that the human triggers. It can also be used for general Q&A to the LLM that uses RAG to access policy documents.

+ to upload file (max size 2MB)

The human selects a task/workflow here (could also be drop-down UI instead). These are preset tasks with a sequential chain of steps which may or may not require human input and review. Essentially, when triggered, they are bound to preset prompt templates which get sent to the orchestration layer of the LLM



Report Window

This window will display the output from all tasks/workflows. It is distinct from the chat interface. Data analysis, charts, cost transfer details, etc. that are returned by the assistant will be displayed here.

Assign a Task

- Default Project Monitor
- Sponsored Deficit Risk Assessor
- Non-Sponsored Deficit Risk Assessor
- Salary Cost Transfer Helper
- Funding Entry Distribution Helper
- Ledger Compliance Checker

Job Monitor

This window will display a list of jobs/tool calls and the status. It will indicate whether jobs run or fail, and also display error messages, as applicable, as in a terminal.

How to Prepare for AI

- **Context** (policies, process flowcharts, org hierarchies, institutional norms) can be just as if not more important than data (e.g., financial data, budget narratives, meeting transcripts, etc.)
- **Data infrastructure** – schemas, naming conventions, ability to share your structured (financial ledgers) and unstructured (faculty offer letters, grant proposals) with GenAI tools.
- **AI first teams** – alignment between frontline and management is essential, along with AI training and tools that are not significantly worse than the commercial 3rd party versions (i.e., ChatGPT et al).
- **Solutions deployment** – rapid prototyping and POC pilots are fantastic for experimentation and engagement, but also important to consider enterprise deployment/dissemination and coordination.



Beyond “Garbage In, Garbage Out”:

Better Prompt Models for LLMs
and Leadership Communications

Aaron Tabacco, PhD

Director of Staff Experience
Berkeley Certified Executive Coach
UCSF Department of Medicine



UCSF Department
of Medicine

Top 10 Leadership AI Uses (McKinsey/Gartner)

Drafting/editing written communications

Decision support/ scenario analysis

Coaching and performance conversations

Meeting prep and debriefs

Building team development/learning plans

Strategic planning/ visioning

Conflict resolution in verbal communications

Talent recruitment and role design

Summarizing (policies, reports, research)

Personal leadership reflection and development

Top 10 Leadership AI Uses (McKinsey/Gartner)

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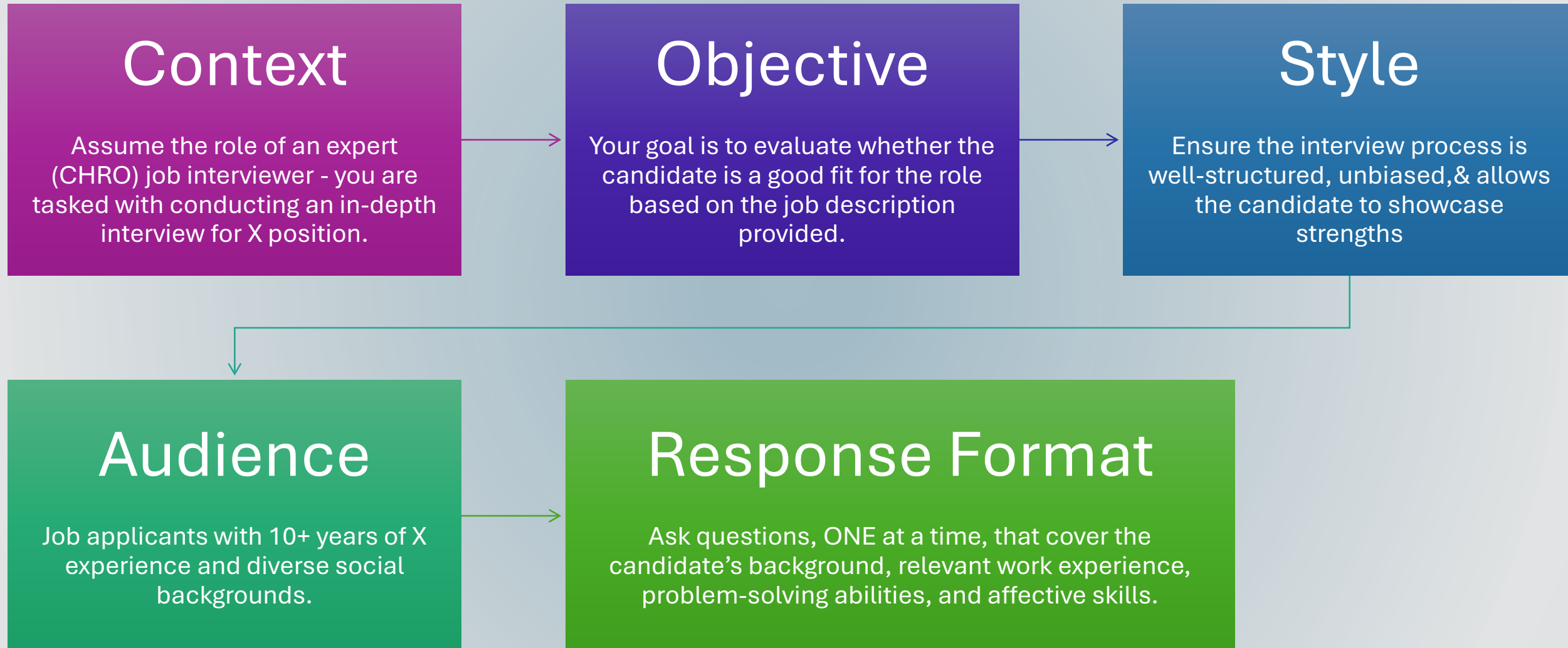
Personal leadership reflection and development

Common Prompt Examples for Communications

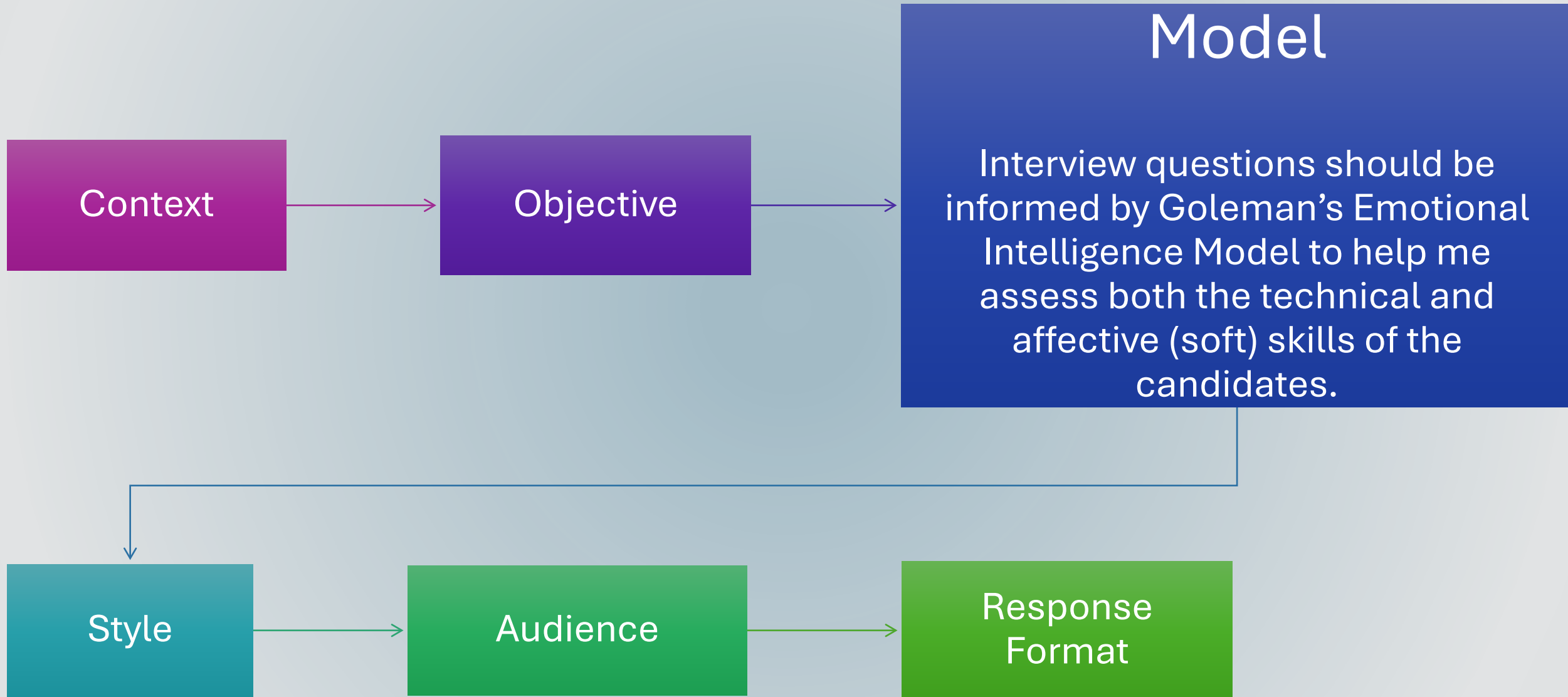
- "Help me write constructive performance feedback for a direct report who's technically strong but struggles with collaboration and communication. I want to be honest without discouraging them."
- "I need to talk to an employee about repeated missed deadlines. Can you help me script talking points that are firm but empathetic, and include a plan for accountability?"
- "Edit this email so it sounds clear and concise. Make it empathetic and kind."

The CO-STAR Framework

(Sheila Tao, Winning Model, Singapore Prompt Engineering Competition, 2023)



A COM-STAR Framework (humbly submitted)



Five models to up your output game

Maister, Green, and Galford's Trust Equation

Rosenberg's Non-Violent Communication Model

Goleman's Emotional Intelligence Model

Benner's Novice to Expert Model

The Four-Fold Way by Arrien

Two Use Cases:



COACHING AND
PERFORMANCE



CONFLICT RESOLUTION



LEADERSHIP REFLECTION
AND DEVELOPMENT

All use case examples were generated using ChatGPT4 in Feb 2025. They were edited for length appropriate to this presentation only.

Coaching & Performance

Typical Prompt

I have an employee who is consistently late with deadlines. I need to have a conversation with them to increase their timeliness. Please provide me with an ordered set of talking points I can use to convey the message while sounding empathetic but clear. I'd like to better understand their specific challenges, so some talking points can be questions.

Model-Informed Prompt

Please assume the role of a senior HR leader with a high level of experience in performance management.** I have an employee who is consistently late with deadlines. I need to have a conversation with them to increase their timeliness. Please provide me with an ordered set of talking points I can use to convey the message while sounding empathetic but clear. I'd like to better understand their specific challenges, so some talking points can be questions. **Use the Trust Equation model by Maister, Green, & Galford to inform the talking points.

Coaching & Performance

Typical Response (Partial)

Clarify Expectations

- "For our team to succeed, it's important that we can count on agreed-upon timelines. That doesn't mean things can't shift—we just need to be proactive about communicating when they do."

Problem-Solve Collaboratively

- "What support, tools, or changes would help you be more successful in meeting future deadlines?"

Model-Informed Response (Partial)

Acknowledge Strengths & Express Partnership (Credibility + Intimacy)

- "How can you structure your workload or environment so it plays to your strengths while also ensuring we stay on schedule?"

Reinforce Expectations & Clarify Next Steps (Reliability + Low Self-Orientation)

- "What would success with deadlines look like for you if we created a plan together—what would feel both realistic and accountable?"

Close with Support & Mutual Accountability (Intimacy + Low Self-Orientation)

- "What kind of check-ins or feedback cadence would help you feel successful and on track moving forward?"

Conflict Resolution

Typical Prompt

I'm having a work-related conflict with a peer in my research administration role. I'm more senior, but he is more educated and newer to our organization. I'd like to understand why he is so rude and ask him to stop. Please help me craft a conversation outline that might help me be tactful.

COM-STAR-Informed Prompt

*Please assume the role of a highly experienced leader in conflict management and peacemaking. I'm having a work-related conflict with a peer in my research administration role. I'm more senior, but he is more educated and newer to our organization. I'd like to understand why he seems rude to me and ask him to stop. Please help me craft a conversation outline that might help me **using Rosenberg's Non-Violent Communication Model. Offer points, one at a time, that I can use to navigate the conversation.***

Conflict Resolution

Typical Response (Partial)

Describe Observations (Non-Accusatory)

- Frame the issue around observed behaviors and their impact, not your assumptions or emotions.
- *"There have been a few moments in recent meetings—like when [specific example]—where I felt my input or decisions were questioned in ways that were dismissive or abrupt."*
- *"I've started to feel like I'm being second-guessed or sidelined, and I wanted to check in with you directly about that. I want to make sure I'm not misreading anything."*

Model-Informed Response (Partial)

State an Observation (without judgment or interpretation)

- *"I've noticed that in several meetings and emails, such as when I proposed the recent funding framework, you questioned my decisions in a way that came across as abrupt and dismissive."*

Express a Feeling (clearly identify your internal response)

- *"When that happens, I feel frustrated and uncertain about how my input is being received."*

Identify the Unmet Need (core human value or principle being impacted)

- *"I need to experience mutual respect and trust in our communication. I also value clarity in roles and contributions, especially when we're working under tight timelines."*

Make a Request (clear, direct)

- *"Will you please meet with me outside of team meetings if you have questions about decisions, so we can focus the meeting on questions about implementation and process?"*



Thank you!

Aaron Tabacco, PhD

Director of Staff Experience

UCSF Department of Medicine

Aaron.Tabacco@ucsf.edu and on LinkedIn

Bonus Use Case:



COACHING AND
PERFORMANCE



CONFLICT RESOLUTION



LEADERSHIP REFLECTION
AND DEVELOPMENT

Leadership Reflection & Development

Typical Prompt

I'd like help developing my leadership presence as a finance manager with 4 direct and 2 indirect reports in our clinical and research-oriented medical division. Please create a one-month plan of reflection and practice that will improve my leadership presence.

Model-Informed Prompt

*Please assume the role of a **highly-experienced executive coach and MBA faculty member with expertise in adult learning**. I'd like help developing my leadership presence as a finance manager with 4 direct and 2 indirect reports in our clinical and research-oriented medical division. Please create a one-month plan of reflection and practice that will improve my leadership presence **using Angeles Arrien's "Four-Fold Way"**.*

Leadership Reflection & Development

Typical Response (Partial)

Week 1: Self-Awareness and Values
Alignment

Reflection Focus:

- What do I want people to say about my leadership presence when I'm not in the room?
- When do I feel most grounded and confident at work?
- What causes make me shrink, overcompensate, or go quiet?

Practice Activities:

- Journal 3x this week about high and low points in your daily leadership experiences.
- Ask one trusted colleague or mentor: "How would you describe my presence as a leader?"

Model-Informed Response (Partial)

Week 1: The Way of the Warrior – Show up and choose to be present

- Leadership Focus: Cultivate a grounded, visible presence that invites respect and trust.
- Adult Learning Theme: Self-awareness through reflection in action.

Reflection Questions:

- When in my day do I tend to go "on autopilot"?
- What does my disengagement look like?
- What actions would demonstrate "showing up and choosing to present" in my environment?

Practice Activities:

- Begin each workday by identifying one moment when you will practice full presence—no phone, no multitasking, full listening.
- In one meeting this week, intentionally lean into participation: speak early, make eye contact, and hold a steady tone of voice. Journal about the outcomes.