



COFFEE CHAT RECAP

Show Us Your Shortcuts: Tips, Hacks & Tools from the L&D Community

Our community showed up with a goldmine of practical tips this session, everything from “close the door” basics to AI reasoning tricks most people haven’t discovered yet. Here’s the full round-up, organized so you can scan for what applies to you right now.

Focus & Environment Hacks

- Close your office door when you need to concentrate — no guilt required, it signals “don’t interrupt me”
- No door? String up crime scene tape or hazmat/caution tape as a “do not enter” signal for your cube
- Draw the blinds too, if you have them, to fully cut off visual distraction
- Turn off audible and visual notifications for email and Slack/Teams
- Ignore email entirely during focused project blocks
- Use something enjoyable (like a quick daily game) as a bookend ritual — a start-of-day warm-up or an end-of-day reward

Task, Project & Goal Tracking

- Track to-dos in a plain spreadsheet instead of a dedicated app — visual, flexible, and easy to expand as projects get more complex
- Build it as one tab per year, so it becomes a running record you can also draw on for annual goal-setting and performance review time
- Copy unfinished items forward into next year’s tab; delete anything you’ve decided you no longer need to do
- Use recurring line items (weekly/monthly tasks, license renewal dates, review cycles) so they’re just sitting there waiting — no need to remember them
- Trello boards to chunk down and organize each project
- Jira/Smartsheet as alternatives with more built-in structure than a spreadsheet

Meeting Habits

- Counterintuitive one: schedule more check-in meetings, not fewer — people tend to get things done when they know they'll have to report back
- Set up recurring “working meetings” or open office hours with busy SMEs — everyone works quietly on their own piece, questions get asked live, and it's often the only guaranteed project time you'll get from them (bonus: it helps remote folks feel less isolated)

PowerPoint & Slide Deck Tips

- Keep a “master” or “source” deck where you copy in every slide you've ever presented — huge for reuse and for tracking your own growth year over year
- Use PowerPoint's actual Slide Master feature (not just a personal template deck) so branding and formatting carry through automatically
- PowerPoint's canvas size isn't fixed to 16:9 — resize it for long infographic-style job aids or any custom dimension
- PowerPoint doubles well as a lightweight design tool for graphics, short videos, and job aids when a full design tool feels like overkill

Canva & Design Tools

- Let Canva do the creative heavy lifting on days your brain isn't up for it — that's the whole point of the tool
- Set up your brand kit once so colors and fonts auto-apply to every template — no manually re-entering hex codes
- Export finished Canva designs as PowerPoint or PDF, or present directly from Canva itself

Screen Capture & Video Tools

- SnagIt's capture delay/countdown timer lets you position your cursor before the screenshot fires
- Adjustable redaction/blur strength for hiding sensitive info in screenshots
- Drop SnagIt screenshots into Storyline rather than recording directly in Storyline — easier to control exactly what's shown, especially with branching content
- SnagIt and Camtasia are integrated — send a SnagIt capture straight into Camtasia for deeper editing
- Camtasia's built-in Rev tool auto-formats step-by-step screen captures into a finished how-to video
- Turn short screen captures into animated GIFs for microlearning or performance support — often more effective (and faster to make) than a written job aid
- The Camtasia/TechSmith maintenance fee is worth paying — one of the more valuable subscription renewals people mentioned

Audio Tools

- Audiate (TechSmith) auto-removes filler words, ums/ahs, and dead air, and can translate audio into other languages
- Set up custom find-and-replace for a speaker's specific verbal tics
- Can swap in a different voice entirely if needed
- Adobe Podcast as another option for cleaning up raw audio

eLearning Tools (Articulate/Storyline)

Built-in AI (still in beta)

- Auto-aligns on-screen text to match audio timing — no more manually dragging text blocks along the timeline
- Builds triggers on request — describe what you want, it suggests the trigger, you approve and double-check before it's added
- Helps with variables
- Reviews your on-screen script and gives feedback on the writing
- Assists with animations and transitions
- General experience so far: dependable, even while still in beta

Screenshots & simulations

- Skip Storyline's built-in screen recorder for simulations — it captures every click separately and gets messy fast, especially with branching. Instead, grab the exact screenshot needed in Snagit (crop, redact, edit as needed), then drop it into Storyline for more control

Workaround for non-AI versions of Storyline

- If you don't have the AI version, describe what you're trying to build to an AI assistant directly and have it write the actual trigger logic, variables, and code — then implement it manually inside Storyline. Works even on older, non-AI versions of the tool

AI for Images & Branding

- Upload an existing image and ask AI to reverse-engineer a text prompt describing its style — then tweak from there instead of prompting from scratch
- In some AI tools, you can view and copy the actual prompt behind a generated image for reuse
- To match a client's brand: screenshot their logo, drop it into an AI tool, and ask for the hex codes — then double-check with a separate color-checker tool, since AI can be slightly off
- A browser color-picker extension works too, if you'd rather skip AI for this

AI for Writing, Analysis & Reports

- Feed AI your raw interview notes or data and ask it to draft the full analysis report — always fact-check and reread before using it
- Then ask it to turn that same report into a one-page visual/infographic to use as your executive summary — stakeholders will read a one-pager when they won't touch a 20-page report
- Generate separate one-pagers tailored to different audiences (executives vs. survey participants) from the same underlying analysis
- Ask AI to review your own script or writing and give direct feedback

AI for Automation & Agents

- Take an AI-generated meeting summary and feed it into another AI tool to auto-generate a dated to-do list/spreadsheet from the action items
- Some meeting-platform AI features do this natively, helping you stay present in the conversation instead of multitasking
- Agents that pull LMS data and auto-build KPI dashboards for stakeholders
- Agents that scan Slack channels and draft knowledge-base articles from the conversation history
- Daily AI-generated summaries and pre-drafted email responses
- Automated Slack reminders/tickers to keep ongoing training programs visible

AI Prompting & Working-With-AI Tips

- If a tool doesn't have a built-in AI assistant yet, take the problem straight to an AI chat tool anyway — describe what you're trying to do in your software and ask it to write the code, triggers, or variables for you
- Use AI as a faster substitute for a program's official help site when you're stuck
- Set explicit limits in prompts (e.g., “no more than 250 words”) — otherwise chatbots tend to over-write
- Watch the AI's visible “thinking” or reasoning trace, when available, to catch it going off-track early and redirect it
- Break a task into explicit multi-step instructions rather than one big prompt, to control the reasoning process more directly

General Tool Philosophy (the “hack behind the hacks”)

- Don't assume a tool's built purpose is its only purpose — several of the best tips here came from repurposing something (a spreadsheet as a to-do tracker, PowerPoint as a design tool)
 - Let the tool do the work it's designed to do instead of manually customizing every detail
 - Click around and experiment inside a tool — you're very unlikely to actually break anything
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