

The Learner's Companion Workbook v3.0

How to Use This Guide

This guide is your personal AI reference book. It goes deeper than the video lessons, but it's built so you can read any section on its own whenever you need it. You don't need to read it cover-to-cover. Use it like a toolbox: grab what you need, when you need it.

Here are three rules that will make your AI journey smoother from day one:

The 15-Minute Rule. After you finish a lesson, try what you just learned on a real task within 15 minutes. Don't wait. The faster you use it, the faster it sticks.

The First Draft Rule. AI gives you a starting point, not a finished product. Think of it like a rough draft from a smart intern. You bring the expertise. You make the final call. You polish the result.

The Data Safety Rule. Some information should never go into a public AI tool. That includes passwords, Social Security numbers, bank account numbers, unredacted driver's licenses, and customer data tied to VINs. When in doubt, swap real names and numbers for fake ones (like [Customer Name] or [VIN]) while you're working with AI, then drop the real info back in when you're done.

Beyond those basics, your company should also consider who on the team has access to which AI tools and what kind of data masking makes sense for your workflows. For example, if you're drafting a dealer follow-up email, replace the dealer's real name with a placeholder while you build the prompt, then swap in the real name before you hit send.

Bottom Line: *AI handles the quantity of work (research, first drafts, brainstorming long lists). You handle quality (strategy, judgment and final decisions).*

MODULE 1: AI Fundamentals and The Modern Professional's Toolkit

This module is about discovering what AI can do for you, finding the AI tools you already have, and building your first personal knowledge base.

Lesson 1.1: Reframing AI and the 4Ds

The ability to use AI safely and effectively at work is called AI Fluency. It's not about becoming a coder or a data scientist. It's about knowing when and how to hand tasks to AI, so you get better results faster.

The core framework for AI Fluency has four steps. We call them the 4Ds:

Describe your task clearly. Tell AI exactly what you want, who it's for, and what the finished product should look like. The clearer you are, the better the result.

Delegate the right tasks. Not everything should go to AI. The best tasks for AI are ones that are repetitive, time-consuming, low-risk, and don't require your personal judgment to complete.

Decide what to keep. AI gives you options. You pick the best one. You're the decision-maker, not the AI.

Double-check the output. AI can make mistakes, sometimes very convincing ones. Read the result. Verify the facts. Make sure it sounds like you, not like a robot.

How to Pick the Right Tasks to Delegate

Before you hand a task to AI, ask yourself three quick questions:

1. **Is it reversible?** If the AI gets it wrong, can you easily fix it? (A draft email: yes. A signed contract: no.)

2. **What's the risk?** A brainstorming list has low risk. A financial report sent directly to a client poses a high risk.
3. **Is it rules-based or judgment-based?** AI is great at following rules ("summarize this in 5 bullets"). It's not great at making judgment calls that require deep context ("Should we fire this vendor?").

The 15-Minute Delegate Exercise

Take 15 minutes and sort your weekly tasks into three groups:

Group	What Goes Here	AI Potential
Only I can do this	High-judgment decisions, relationship calls, creative strategy	Low (AI can assist, but you lead)
A trained assistant could do this	Drafting emails, organizing notes, summarizing reports	High (this is AI's sweet spot)
Anyone could do this	Data entry, scheduling, formatting documents	Very High (automate these first)

The last two groups are where AI saves you the most time. These are the tasks eating up hours of your week that don't actually need your personal expertise to complete.

Combining the 4Ds with Your Time Management

If you already use a priority system (like sorting tasks by urgency and importance), the 4Ds fit right in:

- **Urgent but not important tasks** (quick replies, scheduling, formatting): Full AI delegation. Let AI handle these almost entirely.
- **Urgent AND important tasks** (client-facing reports, high-stakes emails): AI-assisted. Let AI draft it, but review it carefully before sending.
- **Important but not urgent** (strategic planning, process improvement): Use AI for research and brainstorming, but keep yourself in the driver's seat.

Auction Industry Example: *A title clerk processing standard paperwork (high-volume, rule-based) is a strong candidate for AI delegation. A GM negotiating a consignor relationship (high-judgment, relationship-driven) should use AI only for prep work, such as research and talking points.*

Lesson 1.2: The “Big 5” AI Functions

AI delivers the best results when you use one of five action words. We call them the Big 5:

Draft means “create something from scratch.” A first-draft email, a job posting, a proposal outline, a social media post.

Summarize means “take something long and make it short.” A 50-email thread, a 20-page report, a one-hour meeting transcript.

Brainstorm means “give me a lot of ideas fast.” Marketing campaign angles, potential buyer objections and ways to improve a process.

Analyze means “look at this information and tell me what you see.” Sales trends in a spreadsheet, patterns in customer complaints and pricing differences between competitors.

Answer means “find the answer to a specific question using what I’ve given you.” Policy questions from a handbook, details buried in a contract, facts pulled from your uploaded documents.

Your AI Usage Tracker

Tracking your time savings gives you proof that AI is working. It also helps you identify where AI is most effective. Use this simple format in a Google Sheet or Excel file:

Day	Task	Big 5 Function Used	Time Saved (Min)	Quality (1 to 5)
Monday	Dealer outreach email	Draft	15	4
Tuesday	Arbitration thread review	Summarize	20	5
Wednesday	Run list trend check	Analyze	35	4
Thursday	Marketing campaign ideas	Brainstorm	25	3
Friday	Title policy question	Answer	10	5

Over just one week, this example shows a savings of 105 minutes. That's nearly two hours. Over a month, that adds up to 7 or 8 hours of reclaimed time.

Going Deeper: AI-Powered Spreadsheet Tools

Once you're comfortable with the Big 5, you can take your Analyze game to another level with tools built right into your spreadsheets:

In Google Sheets: The Gemini side panel lets you ask questions about your data in plain English. Try: "What's the average sale price by vehicle category?" or "Create a chart showing monthly volume trends." Gemini can also write formulas for you. Just describe what you want: "Highlight every row where the profit margin is below 5%."

In Microsoft Excel: Copilot works the same way, but your data needs to be formatted as a Table first (select your data, then click "Format as Table" on the Home tab). Your file also needs to be saved to OneDrive with AutoSave turned on. This is the number one reason people think Copilot in Excel doesn't work. It's not broken. It just needs those two setup steps.

In ChatGPT: Upload your spreadsheet file directly into the chat. ChatGPT can clean messy data, build charts, run calculations, and even do advanced statistical analysis. The trade-off: it works on an uploaded copy of your file, not the live spreadsheet. So you'll need to download the result when it's done.

Pro Tip: *If you need a complicated spreadsheet formula but don't know how to write one, just describe what you want in plain English. For example: "Write a formula that looks up the sale price for a specific VIN from Sheet 2 and puts it in Column D." All three platforms (Gemini, Copilot, and ChatGPT) can write the formula for you.*

Lesson 1.3: Your Hidden AI Toolkit

You probably already have AI tools built into the software you use every day. You just might not know they're there. Here's where to find them.

Google Workspace (Gmail, Docs, Sheets, Slides)

"Help Me Write" in Gmail and Docs: Look for the sparkle icon or the "Help me write" button. In Gmail, it appears at the bottom of the compose window. In Docs, it appears in the left margin. Click it, type a short description of what you want, and AI drafts it for you. You can also select existing text, and a toolbar appears with options to rewrite, shorten, expand, or change the tone.

"Summarize This Thread" in Gmail: When you open a long email chain, look for the "Summarize this thread" button at the top. One click gives you a bulleted overview of the whole conversation.

The Gemini Side Panel: Your always-available AI assistant. It sits alongside your document or email. Open a messy email thread, open the side panel, and ask it to "pull out all the action items and unresolved issues." It works across apps, too. You can open a blank email, type @filename to reference a specific document in your Drive, and ask the assistant to draft an update based on that document's contents.

Meeting Notes in Google Meet: During a meeting, click "Take notes with Gemini." It generates structured notes with action items and saves them as a Google Doc.

Microsoft 365 (Outlook, Word, Excel, Teams)

Copilot in Word: Open a blank document and a "Draft with Copilot" box appears. Describe what you need. You can also type "/" to pull in files from OneDrive as reference material. To rewrite existing text, select it and click the Copilot icon in the left margin.

Copilot in Outlook: Long email threads show a "Summary by Copilot" banner at the top. Click it for a bulleted summary with citations back to specific messages. To draft a new reply, click the Copilot sparkle icon in the compose toolbar.

Copilot in Teams: During meetings, click the Copilot icon to open a side panel. Ask "What's been discussed so far?" or "List all action items." After the meeting, a Recap tab appears with AI-generated notes organized by topic. In chat threads, click "Open Copilot" in the upper-right to summarize messages you missed.

Important Excel Setup: Copilot in Excel only works if your data is formatted as a Table AND your file is saved to OneDrive with AutoSave on. This trips up more beginners than anything else. Take 30 seconds to set it up right, and it works great.

ChatGPT (Standalone App)

ChatGPT does NOT live inside your productivity apps. It's a separate tool (web or mobile). You copy and paste content in, work with it, and copy the result back out. That extra step is real friction, but ChatGPT makes up for it with powerful features:

- Upload documents, images, and spreadsheets directly into the chat
- Use "Canvas" to work on documents side-by-side with AI
- Pin your best conversations to the top of the sidebar for easy access
- Create Projects (5 files on Free, 25 on Plus) that keep your documents and custom instructions together

Helpful Browser Extensions

Promptly (Chrome Extension): Highlight any text on any webpage, press Ctrl+M, and it rewrites your input into a better-structured prompt before you submit it to any AI tool.

AI Prompt Genius (Chrome Extension): Build and manage a personal library of prompt templates. Syncs your best prompts across different AI chat tools without needing to dig through old documents.

Automated Meeting Notes

Otter.ai and Scribe: These tools record and transcribe meetings in real time, then automatically generate summaries and action items. Scribe goes further: it can watch your screen and automatically create step-by-step how-to guides for any process you walk through.

Lesson 1.4: Building Your AI Knowledge Base

Regular AI tools (like ChatGPT or Gemini) know a lot about the world, but they know nothing about your company, your policies, or your specific operations. A knowledge base fixes that. You upload your own documents, and the AI answers questions using only that material. No guessing. No making things up.

Google NotebookLM (*free version available*)

Go to notebooklm.google.com and click "New Notebook." Upload your files: PDFs, Google Docs, Sheets, Slides, website URLs, YouTube videos, even audio files. You can upload up to 50 sources on the free tier. Each source can be up to 500,000 words.

Why NotebookLM is special: It refuses to answer from general knowledge. It only uses your uploaded documents. When it gives you an answer, it shows inline citations you can click to jump straight to the exact passage. This makes it the safest option for beginners who need accurate, source-faithful answers.

Audio Overview: NotebookLM can turn your documents into a podcast-style discussion. Two AI voices talk through the key points from your uploaded material. This is great for absorbing information while you drive or exercise.

Pro Tip for better Audio Overviews: The automatic version sometimes skims over important details. For tighter results, first ask the text chat to write a detailed, structured script based on your documents. Save that script as a new source in the notebook. Then generate the Audio Overview from that script alone. The result is much more focused and precise.

New in 2026: Video Overviews, plus a Studio panel that creates flashcards, quizzes, and mind maps from your documents. You can also create infographics and data tables. For data tables, click the "Data table" option, optionally customize what to focus on, and click Generate. You can export the result directly to Google Sheets.

Using NotebookLM Inside Gemini: In the Gemini app, click the "+" button, select "NotebookLM," and choose the notebook you want to use. Gemini will now answer questions using that notebook as its source. You can then use Gemini's other tools (like Canvas for building apps or image/video generation) while keeping your notebook connected.

Microsoft Copilot Notebooks (Included with Copilot Business Add-on)

Copilot Notebooks launched in March 2026. Access it from the M365 Copilot app (microsoft365.com/chat) by creating a new Notebook. It has a three-column layout: references on the left, content in the center, chat on the right.

Add Word docs, PowerPoint decks, Excel files, and PDFs from OneDrive or SharePoint. Files stay in sync, so when you update the original, the Notebook automatically sees the changes.

Where Copilot Notebooks shines: Live file sync. If your team updates a policy document in SharePoint, your Notebook reflects the change without you doing anything.

Where it's still catching up: It launched recently and doesn't yet have Video Overviews or mind maps as NotebookLM does.

ChatGPT Projects (Free: 5 files, Plus: 25 files)

In the ChatGPT sidebar, hover over "Projects" and click the + icon. Name the project, upload your documents, and add custom instructions (like "Only reference uploaded files. Cite the source document."). Every chat you start inside that project inherits those files and rules.

Important: Unlike NotebookLM, ChatGPT does NOT automatically restrict itself to your uploaded files. It will happily supplement with general knowledge unless you tell it not to. Add a clear instruction: "Only answer using the uploaded documents. If the answer isn't in the documents, say so."

Custom GPTs (Plus users only): Go to chatgpt.com/create to build a reusable AI assistant with its own name, instructions, and up to 20 knowledge files. You can invoke it by typing @GPTName in any chat. Free users can use GPTs that other people have built (from the GPT Store), but can't create their own.

Knowledge Base Use Cases for Your Business

Here are practical ways to put a knowledge base to work:

Employee Onboarding: Upload your employee handbook, arbitration guidelines, and company policies. New hires can ask questions and get accurate answers with citations, instead of bugging their manager about every little thing.

Meeting Prep: Before a big meeting, upload last quarter's deck, recent financial summaries, and market trend reports. Ask the knowledge base to create an executive briefing with key talking points and potential questions.

Vendor Comparison: Upload competing proposals from different vendors (like transportation companies or software platforms). Ask the knowledge base to build a comparison table showing differences in pricing, liability terms, and service levels.

Client Handover: When someone goes on vacation or transitions off an account, compile all client notes, email summaries, and CRM data into a single notebook. The covering associate can query it to understand exactly where things stand without reading through months of correspondence.

Content Planning: Marketing teams can create a notebook with brand guidelines, competitor content, and past performance data. The AI can then generate content briefs and campaign calendars that align with your existing brand voice.

Lesson 1.5: What AI Can and Can't Do (Superpowers, Limitations, and Hallucinations)

AI is incredibly powerful, but it's not magic. Understanding what it does well and where it falls short is the single most important thing you can learn in this course.

What AI Does Well

- Processes huge amounts of text faster than any human
- Generates first drafts, outlines, and summaries in seconds
- Finds patterns in data that would take hours to spot manually
- Works 24/7 without getting tired, distracted, or moody
- Speaks and writes in dozens of languages

Where AI Falls Short

- It can't access the internet in real time unless you're using a tool with web search built in
- It doesn't "know" your company, your culture, or your relationships
- It can't make judgment calls that require emotional intelligence
- It sometimes presents made-up information with total confidence

Hallucinations: When AI Makes Stuff Up

This is the most important limitation to understand. AI doesn't "think" the way you do. It predicts the next most likely word based on patterns in its training data. Sometimes, those predictions sound perfect but are completely wrong. This is called a hallucination.

Example: You ask AI, "What is NAAA Policy #7 regarding frame damage?" The AI might generate a confident, detailed answer that sounds official but is entirely fabricated. It's not lying on purpose. It's just predicting words that "sound right" based on patterns.

The Three-Layer Defense Against Hallucinations

1. **Constrain the input.** Give AI-specific documents to work from (like a knowledge base). The less it has to guess, the less it will make up.
2. **Show it what you want.** Include an example of a correct answer in your prompt. This anchors the AI to the right format and style.
3. **Tell it what to do when it doesn't know.** Add this to your prompt: "If the answer isn't in the provided documents, say 'I don't have enough information to answer this.' Do not guess."

Checking If an Image or Video Is AI-Generated

Google's SynthID is a tool that embeds invisible watermarks in AI-generated content. To check a suspicious image or video:

1. Open Gemini
2. Go to Settings, then Connected Apps
3. Make sure SynthID is enabled
4. Upload the image or video
5. Ask: "Is this AI-generated? Use SynthID."

Note: SynthID only detects content made by Google's own AI models. For content from other tools (like Sora or Midjourney), Gemini can still analyze visual clues that suggest AI generation, but it can't give a definitive watermark-based answer.

Protecting Sensitive Data

When working with AI, use bracketed placeholders for any sensitive information:

- [Customer Name] instead of the real name
- [VIN] instead of the actual VIN number

- [Account Number] instead of real financial data

Build the prompt with placeholders, let AI generate the output, then swap in the real information in a secure, offline environment before sending or saving.

MODULE 2: The Art of AI Communication (Mastering the Prompt)

This module is about learning how to talk to AI so you get what you actually want. The difference between a useless AI response and a great one almost always comes down to how you wrote the prompt.

Lesson 2.1: Why Most Prompts Fail

Most people type something vague into AI and then wonder why the result is garbage. Here are the five most common mistakes and how to fix them.

Mistake 1: Being Too Vague

Bad: "Write a marketing email." **Better:** "Write a 300-word marketing email about our upcoming heavy-duty commercial truck auction. The audience is regional fleet managers. Use a professional but urgent tone. Include three bullet points highlighting key vehicle categories."

The fix: Add specifics. Who is it for? How long should it be? What tone? What format?

Mistake 2: Stuffing Too Much Into One Prompt

When you jam multiple instructions together in one long sentence (change the tone AND extract the data AND reformat the layout AND add a creative intro), the AI gets confused. It doesn't know what to prioritize.

The fix: Break complex requests into separate steps. Handle one thing at a time.

Mistake 3: Forgetting to Say Who It's For

AI doesn't know your audience unless you tell it. A message to your CEO should sound different from a message to a first-time buyer. A report for the finance team needs different details than one for the marketing team.

The fix: Tell AI who will read the output, what channel it will be delivered through, and what the reader cares about.

Mistake 4: Writing a Novel When a Sentence Will Do

Packing your prompt with unnecessary backstory doesn't help. It actually makes the output worse. AI works best when you give it exactly the information it needs, nothing more.

The fix: Strip your prompt down to the essential details. If a sentence in your prompt doesn't change the output, cut it.

Mistake 5: Not Telling AI What the Output Should Look Like

If you don't specify the format, AI will guess. And it'll guess wrong half the time. You wanted bullet points? It gave you paragraphs. You wanted a table? It gave you a wall of text.

The fix: Be explicit. "Give me the answer as a numbered list." "Format this as a two-column table." "Keep it under 200 words."

Lesson 2.2: The T-C-O Prompting Framework and Personas

T-C-O stands for Task, Context, Output. It's the structure you should use for every prompt you write.

How T-C-O Works

[TASK]: Start with a clear action verb. What do you want AI to do? *Example:* "Summarize the attached email thread and list all action items."

[CONTEXT]: Give the background. Who is this for? What's the situation? What role should AI play? *Example:* "Act as my executive assistant. The email thread is between our team and the vendor about the Q3 delivery schedule. The audience for this summary is our VP of Operations."

[OUTPUT]: Describe exactly what the finished product should look like. *Example:* "Provide a 5-bullet summary followed by a table of action items with columns for Task, Owner, and Deadline."

Adding a Persona

Telling AI to "act as" a specific role dramatically sharpens its output. When you say "Act as a senior automotive market analyst," the AI adjusts its vocabulary, assumptions, and level of detail accordingly.

Good persona examples for the auction industry: - "Act as a respectful dealership relations manager." - "Act as an impartial automotive arbitration mediator." - "Act as an experienced lot operations supervisor." - "Act as a senior fleet remarketing strategist."

Using XML Tags for Clarity

For even cleaner results, wrap each section of your prompt in tags. This helps AI clearly see where one instruction ends and another begins:

```
<task>Draft a concise email to a dealer who recently bought from a competitor.</task>
```

```
<context>We lost their business last week. The goal is to gather feedback on why they chose the other auction, without being pushy.</context>
```

```
<output>A friendly, 3-sentence email with a non-aggressive subject line.</output>
```

The COSTAR Framework (For Complex Tasks)

When T-C-O isn't enough detail, use COSTAR for more nuance:

- **Context:** Background info and the situation
- **Objective:** The main goal
- **Style:** Analytical, persuasive, or conversational?
- **Tone:** Empathetic, firm, casual, authoritative?
- **Audience:** Who will read this?
- **Response:** The exact format (letter, table, JSON, etc.)

Ready-to-Use Auction Industry Prompt Templates

Lost Business Inquiry:

<task>Draft a concise email to a dealer who recently sourced inventory from a competing auction.</task>

<context>Act as a respectful dealership relations manager. We lost their business last week. The goal is strictly to gather feedback on why they chose a competitor, without applying pressure.</context>

<output>A friendly, 3-sentence email with a non-aggressive subject line.</output>

Arbitration Dispute Summary:

<task>Summarize the core differences between the seller's condition report and the buyer's post-sale inspection.</task>

<context>Act as an impartial automotive arbitration mediator. The seller claimed no frame damage. The buyer says there's a bent unibody structure based on alignment specs.</context>

<output>A bulleted list of verified facts, followed by a list of missing evidence needed for a ruling based on standard NAAA policy.</output>

Competitive Pricing Analysis:

<task>Compare the provided wholesale transaction data against the regional retail averages.</task>

<context>Act as a senior automotive market analyst. We're evaluating the profitability of late-model midsize SUVs in the Pacific Northwest market over the last 90 days.</context>

<output>A comparison table showing average acquisition cost, average days to turn, and net margin percentage.</output>

Lesson 2.3: Three Modes of AI Interaction

You can use AI in three different ways, and knowing which mode to use for which task makes a huge difference.

Mode 1: Assistance (Quick Q&A)

You ask a single question. AI gives you a direct answer. This is the simplest mode.

When to use it: looking up a policy, checking a fact or getting a quick definition.

Example: "What's the standard NAAA arbitration window for undisclosed frame damage?"

Mode 2: Augmentation (Working Together)

You go back and forth with AI over multiple exchanges. You refine the output together, as you would with a coworker.

When to use it: Writing a report, developing a strategy, building a presentation.

Example: You draft a proposal with AI, ask it to adjust the tone, then ask it to add a section on pricing, then ask it to shorten the whole thing by 20%.

Mode 3: Agency (AI Does It Mostly On Its Own)

AI takes a complex task and handles multiple steps with minimal input from you. This is the most advanced mode.

When to use it: Building a simple web page, creating an animated chart or generating a dashboard from raw data.

Example tools in Agency mode:

Google Stitch (stitch.withgoogle.com): Upload a screenshot of a website you like. AI analyzes the layout and generates working code that replicates the design. You can then tweak it with plain-language instructions (“Switch to dark mode with our brand colors”).

Google Antigravity: Describe the app you want to build. Multiple AI agents collaborate to write the code, design the interface, and test the result. You review visual screenshots and give feedback instead of editing code by hand.

Gemini Canvas: Upload spreadsheet data and ask Gemini to build an interactive web app. For example: “Create a bar chart race showing sales volume by vehicle brand over the last 5 years.” It writes the code and renders the result in the browser.

Self-Updating Dashboards: Publish a Google Sheet as a CSV (File > Share > Publish to web > CSV format). Feed that URL into Gemini Canvas and ask it to build an HTML dashboard that reads the live data. Add a refresh button, and you have a dashboard that updates whenever your spreadsheet changes.

Key Insight: *Most people start in Assistance mode and stay there. The real productivity gains come when you move into Augmentation (for creative work) and Agency (for automating multi-step processes).*

Lesson 2.4: From Good to Great (The Refinement Cycle)

Great AI output rarely comes from the first try. The pros don't just accept what AI gives them. They refine it.

The Self-Critique Method

Instead of just accepting the first response, tell AI to critique itself:

Step 1: Generate the initial response.

Step 2: "Now evaluate your output against these criteria: accuracy, clarity, tone, and completeness. Identify three specific weaknesses."

Step 3: "Rewrite the response to fix those weaknesses."

This forces AI to think more carefully and usually produces a noticeably better result.

System Prompts vs. User Prompts

In advanced tools like Google AI Studio, you can set two different kinds of instructions:

System Prompt: The rules that stay the same every time. Think of it as the AI's "job description." Example: "You are a highly analytical financial auditor. Use formal language. Do not speculate. If you don't have data to support a claim, say so."

User Prompt: The specific task for this session. Example: "Analyze the attached Q3 revenue data and identify the top 3 anomalies."

Separating the two keeps AI focused. The system prompt prevents it from drifting off-topic or getting too casual.

Annotation-Based Editing (Google AI Studio)

When you're working on a long document or piece of code in AI Studio, you don't have to rewrite the whole thing every time something's off. Instead:

1. Highlight the specific section that needs fixing

2. Add a note explaining what to change ("Make this transition smoother" or "Simplify this paragraph")
3. AI applies the edit to just that section, leaving everything else untouched

This is way faster than regenerating the entire output from scratch.

Specialized AI for Vehicle Inspections

For certain tasks, general-purpose AI isn't the right tool. Vehicle inspections are a good example. Companies like Black Widow Imaging & UVeye (now part of ACV's VIPER system) and Click-Ins use specialized computer vision AI:

Drive-Through Inspection Tunnels: Vehicles pass through imaging hardware that captures thousands of high-resolution photos in seconds. AI algorithms detect tire wear, fluid leaks, and body damage, then generate standardized condition reports.

Smartphone-Based Inspection (Click-Ins): Field inspectors use their phone cameras. AI uses advanced 3D mapping to calculate exact damage dimensions and cross-references findings against manufacturer data to confirm the damage is physically possible. This reduces post-sale arbitration disputes significantly.

Lesson 2.5: Your Master Prompt Library

A prompt library turns AI from a personal experiment into a scalable business tool. Instead of reinventing the wheel every time, you save your best prompts and reuse them.

What Goes in a Prompt Library

Every prompt you save should have:

- A clear title (e.g., "Weekly Dealer Outreach Email")
- The full prompt text with [PLACEHOLDERS] for the parts that change each time
- Which AI tool it works best with
- Notes on how to customize it

Custom AI Assistants (Gems, GPTs, and Agents)

All three major platforms let you create reusable AI assistants with saved instructions:

Google Gemini Gems: Go to gemini.google.com, click "Explore Gems" in the left panel, then "New Gem." Write your instructions, upload reference files, and save. To use a Gem, select it from the side panel in any new chat. You can share Gems with your team via a link.

Microsoft Copilot Agents: Build agents through the Agent Builder. Use @AgentName in chat to invoke them. Agents can pull from SharePoint files and work inside Teams, Word, and PowerPoint.

ChatGPT Custom GPTs (Plus only): Go to chatgpt.com/create. Set a name, instructions, and upload knowledge files. Invoke with @GPTName in any chat. Free users can use GPTs from the store but can't create them.

Ready-to-Use Custom Assistant Ideas

The Prompt Library Assistant: Set up a Gem or GPT with these instructions: "You are a world-class prompt engineering consultant. When I describe a business task, ask me these questions one at a time: 1) What's the main goal? 2) Who's the audience? 3) What tone should it use? 4) What should it always do? 5) What should it never do? 6) What format should the output be? After I answer all six, generate a complete T-C-O prompt and suggest a title for my library."

The Pre-Call Battle Card: Upload CRM notes and meeting history. Instructions: "When I paste raw notes about a dealer or client, output a four-part brief: 1) Client Snapshot, 2) Recent Activity Summary, 3) Key Talking Points, 4) Likely Objections and Suggested Responses."

The Meeting Processor: Instructions: "When I paste a meeting transcript, ignore small talk and output a formatted email draft with: Key Decisions Made, Main Discussion Points, and an Action Item table with Task, Owner, and Deadline columns."

The Sales Proposal Writer: Upload past winning proposals, pricing structures, and service agreements. Instructions: "When I describe a new prospect, draft a customized proposal that follows our standard format and aligns with our historical pricing."

BONUS SECTION: AI Use Cases for Your Business

This section gives you practical ideas you can try today. No theory. Just specific things AI can do for people in auto auctions, remarketing, and dealerships.

Understanding Your Business Data

Find Hidden Patterns: Upload your sales data or auction logs. Ask AI to clean up messy formatting, then identify things like which vehicle types sell best on which days, what pricing patterns you might be missing, or which lanes are underperforming.

Deep Industry Research: Ask AI to research what competing auctions are doing, what buyers are looking for right now, and where market trends are heading.

Stress-Test Your Ideas: Give AI your plan for an upcoming sale or a new pricing strategy. Ask it to find the weak spots. Ask it to role-play as a tough dealer and push back on your proposal. Fix the problems before they happen in real life.

Visual Explanation: If you have a confusing chart, a weird error on your screen, or a dashboard that doesn't make sense, take a screenshot. Upload it to AI and ask: "What does this show? Explain it in simple terms."

Marketing and Finding Buyers

Ad Campaign Planning: Tell AI about your business, your location, and your target buyer (local dealers, fleet managers, retail customers). It can recommend the best advertising channels and help you craft the messaging.

Social Media Scheduling: Ask AI to map out your posts for the week. It can suggest which days and times to post about upcoming inventory, what kinds of photos to feature, and which headlines will get the most engagement.

Website Audit: Give AI a link to your website. Ask how to make it easier to use, how to improve the design, and how to rank higher in Google searches.

Writing and Staying Organized

Template Creation: Upload an old report or form you use regularly. AI can turn it into a clean, reusable template with blank fields ready to fill in.

Weekly Digest: AI can read through your emails, meeting notes, and documents from the week and produce a short summary of everything important that happened.

Project Checklists: For any big project (setting up a new lane, launching a marketing campaign or onboarding a new consignor), ask AI to create a detailed step-by-step checklist.

Note Cleanup: If you dictate notes into your phone while walking the lot, paste that messy text into AI. It will organize it into clean, categorized action items.

Images, Video, and Audio

Image Creation: Gemini's Nano Banana image model can create marketing visuals, social media graphics, and even 3D figurine-style characters from your photos. For specific aspect ratios (like 16:9 for presentations), upload a blank transparent PNG in your target dimensions as a reference.

Video from Slides: Google Vids can turn a Google Slides deck into a narrated, music-backed video with AI voiceover and automatic audio ducking (music lowers when the narrator speaks).

Listen to Documents: NotebookLM turns long reports into podcast-style audio. You can listen while you drive, exercise, or walk the lot.

YouTube Summaries: Paste a YouTube link into Gemini. It will give you the key points without making you watch the whole video.

Background Noise Removal: Meta's SAM Audio tool can isolate specific sounds from a recording. It separates voices from engine noise, wind, or crowd sounds, giving you clean audio without expensive editing software.

Brand-Matched Content: Google Pomelli extracts your brand colors, fonts, and writing style from your website URL. It then generates social media posts, ad banners, and short videos that match your existing brand identity.

BONUS SECTION: Ready-to-Use Productivity Prompts

These prompts are ready to copy, paste, and customize. Replace anything in [BRACKETS] with your own details.

The Cross-Workspace Executive Briefing

Use this with the Gemini app and @Google Calendar, @Google Drive, @Google Docs, and @Gmail extensions. (You'll need to activate each @Workspace reference manually in the Gemini app.)

What it does: Scans your calendar, documents, email, and drive activity from the past two weeks and produces a structured pre-meeting briefing organized by business area.

Your Role: You are my expert Executive Assistant. Create a comprehensive Pre-Meeting Briefing by synthesizing my key activities across Google Workspace from the past two weeks.

Step 1: Search @Google Calendar for significant meetings, @Google Drive and @Google Docs for new or recently edited documents, and @Gmail for high-priority email threads.

Step 2: Connect the dots. Identify the top 3 to 5 most critical themes that appeared across multiple apps.

Output format:

- Executive Summary: Top themes (3 to 5 bullets)
- Detailed Breakdown by category: Operations, Technology, Content, Vision and Strategy
- Each item should include the topic, key takeaway, and the app/file it came from

The Meeting-to-Sheet Processor

Use this after any meeting to turn messy notes into an organized task tracker.

I just finished a meeting. The notes/transcript are in: [PASTE LINK OR FILENAME]

Act as an Executive Operations Officer. Convert this conversation into execution.

Scan for:

1. Explicit commitments ("I will do X", "Let's schedule Y")
2. Implied needs (if someone says "We don't have a design yet," create a task: "Create Design")
3. Urgency signals (if the tone was stressed or revenue was mentioned, mark Priority as Critical)

Team Roster:

- [NAME 1]: [EMAIL] (Role: [ROLE])
- [NAME 2]: [EMAIL] (Role: [ROLE])
- [NAME 3]: [EMAIL] (Role: [ROLE])

Output: A CSV code block (not a markdown table) with these columns:
Task Name, Owner Name, Owner Email, Status (default: Not Started),
Priority, Due Date, Impact (High/Med/Low), Notes/Context

Rules:

- Task names must start with a verb ("Draft H1 Copy" not just "Copy")
- In Notes/Context, paste the exact quote from the transcript
- Ignore small talk. Focus on execution.

The Universal Project Planner

Use this with any project plan or document. Customize the team roster once and save it.

I am [YOUR NAME], the [YOUR TITLE] of [COMPANY NAME].

We are executing: "[PROJECT NAME]" (see attached document).

Goal: [BRIEF GOAL]

Your role: Senior Project Manager. Your prime directive is "Protect [YOUR NAME]'s time" so I can focus on [YOUR DEEP WORK ACTIVITY].

Instructions:

1. Parse the attached document. Find every action item, task, and deliverable.
2. Assign each task to the right team member based on their specialty.
3. If urgency is implied, mark as P0. Otherwise, mark as P1.

Team Roster:

- [YOUR NAME] (Leader): Focus on [YOUR KEY FOCUS]. Do not assign admin or scheduling tasks for me.
- [TEAM MEMBER 1] ([ROLE]): Focus on [SPECIALTY]

- [TEAM MEMBER 2] ([ROLE]): Focus on [SPECIALTY]

Output:

1. Master Build Sheet: CSV with columns for Task ID, Phase, Task Name, Owner, Priority (P0 to P3), Deadline Suggestion, Notes/Dependencies
2. Delegation Briefs: A short message for each team member listing their top 3 tasks
3. Leader's Check: Items I need to review or approve to unblock the team

Gap Analysis: If the document mentions a goal but misses the steps, add the missing steps as tasks and assign them.

BONUS SECTION: AI Tips, Tricks, and Tutorials

This section is a living reference. As new tools and techniques appear, new entries get added here. Check back often.

Image Tips

Force a Specific Aspect Ratio (Gemini / Nano Banana): Create a blank, transparent PNG in your target aspect ratio (like 16:9). Upload it along with your image prompt. Tell Gemini: "Use the attached transparent image as an aspect ratio reference. Fill the canvas to match these exact dimensions."

Face Swap Consistently: 1. Open your target photo in any image editor (even MS Paint) 2. Paint a solid color over the entire face/head 3. Upload this masked image AND your source face photo to Gemini 4. Click Tools > Create images and give your blending instructions

Upscale Blurry Photos: Upload a low-resolution photo to Gemini. Click Tools > Create images and use a restoration prompt. Note: Gemini is “guessing” the missing detail, so faces may change slightly. Hit Redo for different results.

Remove AI Watermarks: Method 1: Crop it out. Method 2: Use Canva’s Magic Eraser. Method 3: Use playground.bl.ai with the Kontext model to paint out the watermark.

Create Professional Logos: In Gemini, go to Gems. Create a new Gem called “Logo Generator.” Add instructions describing your logo style preferences and upload a reference logo to the knowledge base. Use **Thinking/Pro** mode for better results.

Video Tips

Extend AI Video Beyond 8 Seconds (Google Flow / Veo 3):

1. Open your video in Google Flow’s Scene Builder
2. Move to the last frame and save it as an image asset
3. Use “Frames-to-Video” with that saved frame to generate the next segment
4. Repeat to keep extending

Turn Slides into Video (Google Vids):

1. Open your Google Slides deck
2. Use the convert-to-video workflow (opens in Google Vids)
3. Choose a voiceover option (AI voice or avatar)
4. Add background music and enable audio ducking
5. Review timing per scene and export

Bar Chart Race Animations (Gemini Canvas):

1. Ask Gemini to research your topic and return data as a table
2. Open Tools > Canvas
3. Ask it to build a web app that displays a bar chart race with your data
4. Use Share to open full-screen, then screen-record the animation

Audio Tips

Isolate Sounds from Noisy Recordings (Meta SAM Audio): Upload your audio file. Target the specific sound you want to keep (a voice, an instrument). The AI separates the frequencies into clean, individual layers.

Remove Dead Air and Filler Words (SpeakerSplit): AI scans your audio and automatically splices out "um," "uh," long pauses, and dead air. Saves hours of manual editing for podcasts, walkaround videos, or executive updates.

Automation Tips

Build Reusable Workflows with Gems: 1. In Gemini, go to Gems and create a new one 2. Write instructions for a task you repeat often 3. Attach reference files if needed 4. Every time you use that Gem, it follows the same process

Surgical Code Edits with Annotations (AI Studio): Instead of rewriting entire files, highlight the exact section you want changed. Add an annotation describing the edit. AI applies the change to just that section.

What's New in AI (Spring 2026)

This section covers major updates to the three platforms taught in this course. As new features roll out, this section will be updated.

Google Gemini Updates (Q1 2026)

Gemini 3 Pro: Google's most advanced reasoning model, now available to everyone in the Gemini app. Select "Thinking" in the model dropdown for the best results on complex tasks. Responses are more helpful, better formatted, and more concise than previous versions.

Gemini 3 Deep Think (Ultra subscribers only): A specialized reasoning mode that runs multiple rounds of analysis to solve hard problems in math, science, and logic.

Personal Intelligence (Free for all U.S. users): Gemini can now connect across Gmail, Photos, and YouTube to give personalized help. For example, it can help plan a project by pulling context from your recent emails and documents.

Chat History Import: You can now transfer your chat history and AI memories from other providers (like ChatGPT) into Gemini in just a few clicks.

Gemini Live Upgrade (3.1): Conversations flow faster, hold context twice as long, and feel more natural. You can also mute your mic without pausing the conversation.

Nano Banana 2: The upgraded image model adds text in any language with real-world accuracy. You can circle, draw, or type directly on an image to make edits.

Google Opal: A new tool from Google Labs that lets you build custom AI mini-apps ("Gems on steroids"). Create reusable workflows with a visual node-based interface.

Search Live: Expanded to 200+ countries. Tap the "Live" icon in the Google app to have a voice conversation with AI for real-time troubleshooting, research, or learning.

Microsoft Copilot Updates (Q1 2026)

Free Copilot Gets Smarter: The free version of Copilot (Copilot Chat) now has inbox and calendar awareness, plus access to Word, Excel, and PowerPoint agents. This is a major upgrade from the standalone chatbot it used to be.

Agent Mode in Word, Excel, and PowerPoint: Copilot can now actively make changes to your files while reasoning through those changes, instead of just suggesting edits.

Video Recap for Meetings: When you ask Copilot Chat to summarize a meeting, you now get a narrated highlight reel alongside the written summary, combining key takeaways with short video clips.

Customizable Meeting Notes Templates: Choose from ready-made templates (Speaker Summary or Executive Summary) or create your own by describing the structure you want. Save custom templates for future meetings.

Copilot Notebooks Revamped: Better navigation with references, content, and chat in one side-by-side view. Faster artifact creation and easier team sharing.

GPT-5.2 in Copilot Chat: Users can choose between Quick Response (fast answers) and Think Deeper (more thorough reasoning) modes.

Pricing Update (Effective July 1, 2026): Microsoft is raising prices on M365 suite subscriptions. Plan accordingly.

ChatGPT Updates (Q1 2026)

Canvas Improvements: Continued refinements to the side-by-side document editing experience.

Projects Expansion: Better file management and instruction handling within Projects.

Custom GPTs remain Plus-only: Free users can use GPTs from the store but still can't create their own. Free tier is limited to 10 messages per 5 hours on the flagship model.

Quick Reference: Platform Comparison

Feature	Google Workspace	Microsoft 365	ChatGPT
Monthly Cost	\$14/user	~\$30-33/user (Biz Std + Copilot)	Free (\$0) or Plus (\$20/mo)
AI in Apps	Yes (Docs, Gmail, Sheets, Slides)	Yes (Word, Outlook, Excel, Teams)	No (standalone app only)
Knowledge Base	NotebookLM (best for accuracy)	Copilot Notebooks (live file sync)	Projects (requires manual instruction)
Custom Assistants	Gems (select from panel)	Agents (@AgentName in chat)	Custom GPTs (@GPTName, Plus only)
Spreadsheet AI	Works on data in sheet	Requires Table format + OneDrive	Upload file, works on copy
Data Training	Opted out for Workspace	Opted out by default	Opted OUT on Plus, IN on Free

Glossary

4Ds: Describe, Delegate, Decide, Double-check. The four-step framework for using AI effectively.

Big 5: The five most useful AI actions: Draft, Summarize, Brainstorm, Analyze, Answer.

T-C-O: Task, Context, Output. The structure for writing clear AI prompts.

Hallucination: When AI generates information that sounds real but is made up.

Knowledge Base: A collection of your own documents that AI uses to answer questions accurately. Examples: NotebookLM, Copilot Notebooks, ChatGPT Projects.

Gem (Google): A custom AI assistant with saved instructions and reference files in Gemini.

Custom GPT (ChatGPT): A reusable AI assistant with a name, instructions, and knowledge files. Plus users only.

Agent (Microsoft): A custom AI assistant built in Copilot that works inside Microsoft 365 apps.

Prompt: The instruction you type into an AI tool.

Persona: A role you assign to AI (like "Act as a senior market analyst") to improve output quality.

Token: The unit AI uses to measure text. Roughly, 1 token equals about 3/4 of a word. Longer prompts use more tokens.

Context Window: The total amount of text AI can "see" and remember within a single conversation.

RAG (Retrieval-Augmented Generation): The technical term for what a knowledge base does. AI retrieves information from your documents and then generates an answer based on what it finds.

SynthID: Google's tool for detecting AI-generated images and videos by checking for invisible watermarks.

Nano Banana: Google's AI image generation model built into Gemini.

Copilot Notebooks: Microsoft's knowledge base tool, similar to NotebookLM.

This guide is a living document. New tools, features, and techniques are added regularly. Keep it handy and check back often.

For questions or support: domenic@agenix.dev | 410.905.8332

Developed by Agenix LLC in partnership with the Independent Auction Group (IAG)