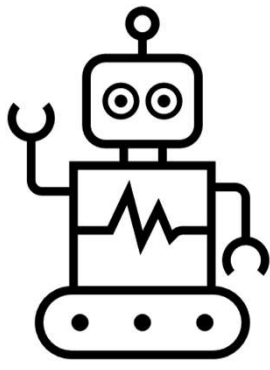






Everyday AI: How Real People Integrate AI into Their Daily Tasks, Projects, and Workflows

with Copilot, Gemini and Claude



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The E-mail Sanity Expert®



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First, are you even allowed to use?

1. Full usage?
2. With restrictions?
3. Not allowed for work?
4. “Currently under consideration” ...
5. Not sure. No one has said anything!

Are you?

- Using regularly
- Using occasionally
- Using rarely
- Haven’t used
- Just using for personal – not work

Any policies related to AI acceptable use, ethics, FOIA, etc.?

2

“Teach someone to fish,
you will feed them for a day.

Show them HOW to fish,
you will never find them on a Saturday.”

(Same goes for golf, pickleball, gardening, “rockhounding”, etc.)

3

One of the first tools that can teach you, then you
teach it, and then it teaches you more!

Prompts:

What AI tools are most popular with municipal and county
Clerks in the state of Florida?

We are a small county clerk’s office in Central Florida, serving
several smaller communities and rural areas.

What AI tools and solutions do you recommend we consider
integrating into our clerks office operations?

Microsoft Copilot ...

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So, what have you already done with AI?

1. Write an e-mail? Edit an e-mail? Coach you to write better e-mails?
2. Create a document? Spreadsheet? PowerPoint? Website?
3. Build and share a community education plan on voting/voter registration/Business registration/change of address/etc.?
4. Summarize documents, articles, books?
5. Listing/pricing research/market analysis/policy analysis?
6. Comparison shop? Personal plans? (Travel, Fitness, Lifestyle?)
7. Use for video creation/development/social media?
8. Assist with Search Engine Optimization for web site/social?
9. Build/enhance plans for other work projects/activities/events?
10. Automate work processes/actions?
11. Customer service applications?
12. Build your OWN apps for computers/phones?

Anything else?

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Prompt:

Context:

Assume I am the county clerk for a suburban county in South Florida . My office is in the process of adopting AI to help with daily operations, marketing & social media, market analysis, vendor selection, and customer service.

Request:

What steps would you recommend for our office to build an AI adoption plan for all of the areas mentioned above? What are the “watch outs” from using AI for these activities?

Google Gemini ...

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Prompt:

I am *(insert job and kind of business/service/product, location, market Size, customer and competitor profile, etc.)*

Context:

I would like to build a plan to start adopting AI in my *(list the parts of your job or business that you believe AI could help you save time, be more productive)*

Request:

What steps would you recommend for me to build an AI adoption plan for all of the areas mentioned above? What are the “watch outs” from using AI for these activities?

How do you recommend I train myself on the steps in the plan above?

Please only provide advice based on properly published and sourced material.

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Watch Out! AI “False Confidence” ...



If they don't know or can't find it, they often make it up.

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Several “Right Now” Uses ...

1. Drafts & Composition – no more “writer’s block”
2. Proposal/listing development/submission
3. Coaching to improve your skills (and your buyers and sellers)
4. Summaries – managing info overload
5. Social media, web site, video, blog, podcast, SEO
6. Insurance market analysis and research
- 7. Planning & Strategy! – better plans faster**
- 8. ... including building plans to “create” better/
more informed buyers and sellers**

And now APPS! And Automations ...

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Tip 1: E-mail Drafts



Note the use of prompts and re-prompts ...

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Let's talk prompts: context-based prompting

Prompt:

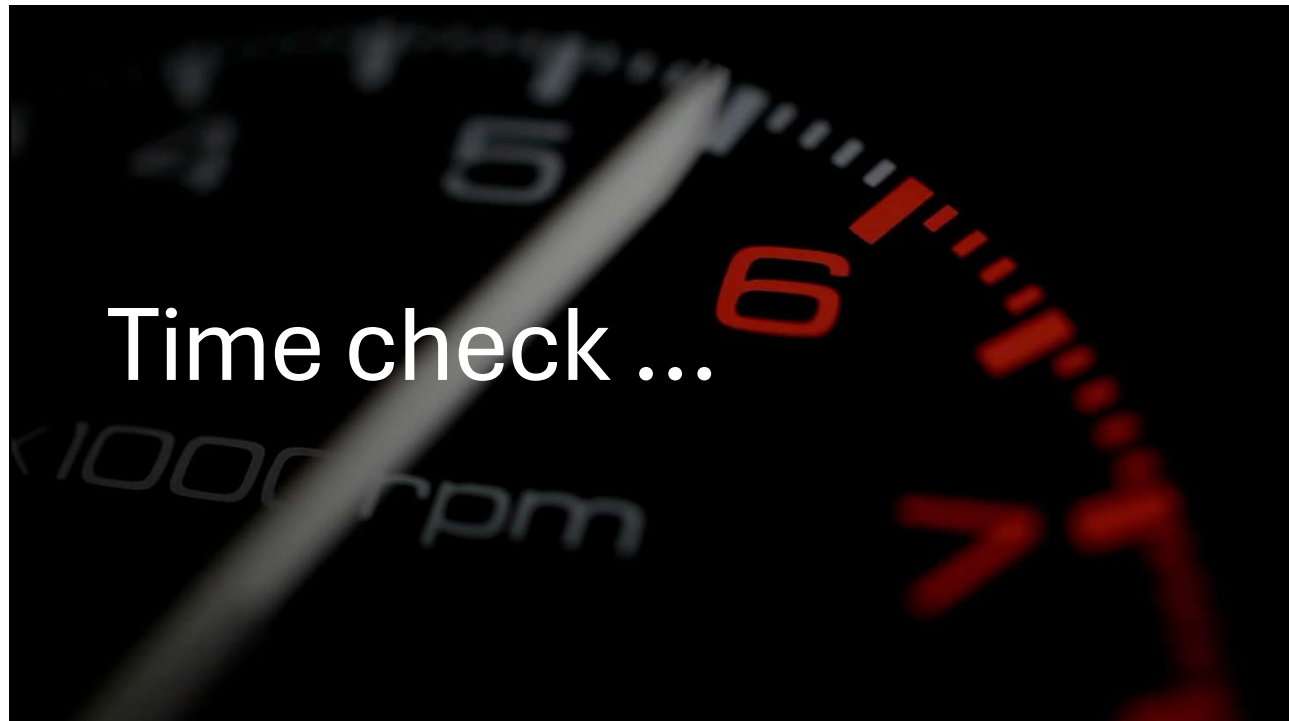
“Pretend I am a high-producing insurance provider in a competitive market in Mid Michigan getting ready to meet a prospective well-to-do business owner for the first time to discuss policy options for a local home goods retail business with three locations.

What advice would you give me to prepare for our initial meeting?”

Microsoft Copilot ... (and a quick note about cross prompting)

And then, iterations!

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If time is short, make sure to show:

- YouTube video SEO example
- Discuss related blog example
- And new Word.doc option (transcripts)
- Recent Claude RFP submission (got idea from someone completing professional certification requirements)
- Self-training options on YT & LinkedIn
- Aitoolsdirectory.com
- How to “5X” your “FREE”
- Claude Automations I’ve adopted
- My new Claude Cowork/Copilot Tasks Workspace set up

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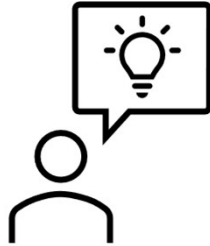
Tip 2: E-mail “Voice”



This made me laugh ...

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Inside Tip: Rewrite to YOUR voice every time!



Otherwise, they will know ...

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Tip 3: E-mail & Document Summaries



When your co-workers and clients refuse to get to the point ...

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Watch Out! You lose depth and nuance ...



And you might miss something important that AI didn't highlight

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Quick Tip: Book and Article Summaries



You don't know what you don't know...

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Tip 4: Community research & knowledge



Could save a lot of time and provide useful knowledge on community...

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Tip 5: Document & Proposal Drafts



Writer's block is real ... but not for AI

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Fun Tip: This is crazy ... a resume by voice???



This doesn't have to be hard!

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Tip 7: Initial Plan Creation



You don't know what you don't know ...

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Tip 8: Research and info generation ...



Check and list the sources; rewrite to your voice (plagiarism concern) ...

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Watch Out! Litigation risk?



Some companies are not allowing use of A.I. for this reason.

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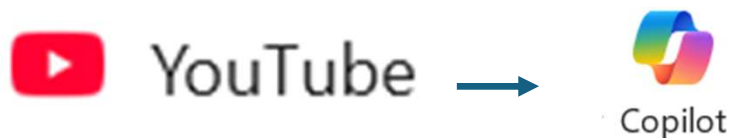
Tip 9: Presentation/Video/Social Media Generation and Management



Potentially VERY helpful for your outbound comm efforts ...

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Cool cross usage of AI systems ...



Would not have even happened without this ...

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Tip 10: And NOW ... Automations!

Claude Cowork



Copilot
Tasks

Saved me 5-10 hours a week first week I used it!

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Have you done this?

Prompts:

Who are the best video creators on AI tips on YouTube?

Who are the most popular content creators or experts on AI on LinkedIn?

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Inside Tip: 5x your daily “free” prompts ...



Copilot, Gemini, ChatGPT, Claude, Perplexity ...

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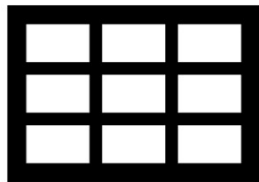
Found this recently ...

<https://aitoolsdirectory.com/>

Because you need to be aware of what's out there ...

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Tip 11: Excel tools!



Because this might be easier ...

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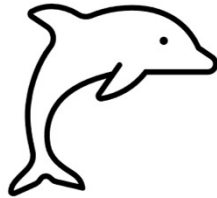
Some Excel Capabilities

- Summary of text columns (think of survey results)
- Clean up data:
 - Find and highlight empty cells
 - Make all data in column or row of same format
- Build charts
- Analyze trends (seasonality, markets, products, etc.)
- Make forecasts
- Suggest formulas
- Build dashboards
- Use Python, Vlookup, Pivot Tables

**This could be a
course all of its
own!**

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Tip 11: Image/Music/Video Creation



*I am so torn on the ethics of this ...
(And I believe there is some effort to monitor in real estate usage ...)*

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Quote to consider ...

“AI was supposed to give us more time to write, create art, be creative by doing mundane tasks for us. Instead, it writes, creates art, and helps with the creative, leaving us more time to complete our mundane tasks.”

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Favorite AI Capabilities (in Summary)

- Document/E-mail draft creation and revisions
- Learning from AI coaching on your biz writing
- Summarizing e-mails, documents, articles, books
- Building/checking your plans for projects/activities/events
- Market analysis/research
- SEO/Video/Social tools
- Fast research on a topic! (But be careful!)
- Copilot integrations with Word, Excel, Powerpoint, more 365 tools
- Similar capabilities with Gemini in Google Workspace
- *And now, apps, automations, and assigned tasks with Claude & Copilot!*

These are the
“low hanging
fruit” in my
opinion!

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Tip 12: A bit “beyond” my current skill set ...

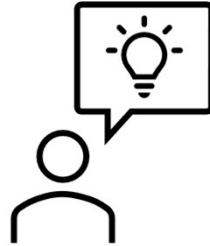
Took program on Copilot Studio ...

- Can use Copilot in conjunction with Microsoft Power Automate
- Can set up “agents” (Chat Bots) to respond to questions on your web site
- Can set up “agents” to “auto-respond” to specific e-mails to certain e-mail addresses
- Can set up “agents” to respond to web form inquiries
- “Agents” can be programmed to “elevate” to a real human if needed
- I recommend using a highly regarded AI vendor for this

68% of organizations will have frontline AI agents for customer service operations by 2026!

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What are your best tips?



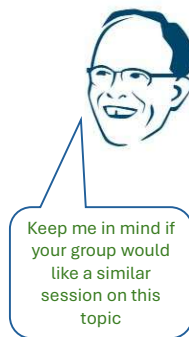
I'm looking into building apps next ... can it actually work for me?

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We're Done!!!



Something else you might like ...
Use this QR Code to Access
My YouTube Channel Guide



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