

Google Gemini for Workspace — Workbook

This workbook turns the course into tools you use every day: a surface-and-access setup sheet, a data-governance and verification policy, a Gmail-and-Docs drafting kit, a Sheets analysis and charting playbook, and a Meet-and-workflows routine. Work through one section per module, running each prompt in the Gemini side panel or the Gemini app and filling the worksheets as you go. By the end you will have a personal prompt library grounded in your own Drive files, a set of repeatable cross-app workflows, and the privacy and accuracy guardrails that keep Gemini safe to use at work.

Getting Gemini Working Across Workspace

Confirm your access, learn which Gemini surface to use for each task, and lock in the data-governance and verification rules before you trust it with real work.

Worksheet: Access and Surface Setup Sheet

Fill this in once so you know exactly what you have and which Gemini door to use. If a field reveals a gap (for example, the side panel is missing on a work account), note the action and who can fix it.
Account I am using (personal gmail.com or work/school domain)

Plan and what it unlocks (free, Google AI Pro, Workspace Business/Enterprise)

Is the 'Ask Gemini' side panel visible in Gmail and Docs? (yes/no)

Is 'Take notes for me' available in Google Meet? (yes/no)

If features are missing, the action and owner (e.g. ask admin to enable)

Which account I will use for confidential work and why

Exercise: Practice Picking the Right Surface

Run each task below in the surface you think is correct, then confirm it worked. The goal is to build instant muscle memory for app vs. side panel vs. in-line helper, so you stop hunting for the feature.

- In a Gmail reply, use Help me write: 'Reply confirming I can meet Thursday at 2pm and ask them to send the agenda.'

- In a Doc you are reading, open the side panel and ask: 'Summarize this document and list the key decisions and open questions.'

- In the Gemini app, ask a general question unrelated to any file and notice it cannot see your open document unless you attach it.

Worksheet: Data-Governance and Verification Policy

Write your personal rules for using Gemini with real information, then keep them visible. These two habits — keep sensitive work in the governed account, and verify before you ship — underpin everything else in the course.

Data categories ALLOWED in Gemini (e.g. internal drafts, general questions)

Data categories OFF-LIMITS (e.g. client PII, financials, confidential)

Which account confidential work goes in (governed Workspace, never free personal)

My verify-before-send rule (what I always check: figures, names, dates, claims)

Personal-account activity setting reviewed and adjusted? (yes/no/N/A)

Checklist: Setup and Safety Checklist

- Confirmed which account and plan I am using and what Gemini features it unlocks
- Located the 'Ask Gemini' side panel and at least one in-line helper (Help me write)
- Confirmed with admin or terms that enterprise data protection applies to my work account
- Adopted the rule: confidential work stays in the governed Workspace account
- Adopted the rule: verify every figure, name, date, and claim before sending or publishing

Gmail and Docs: Writing Faster

Build a reusable email drafting and reply workflow, a notes-to-document loop in Docs, and the @-grounding habit that makes Gemini answer from your own files.

Exercise: Draft, Summarize, and Reply in Gmail

Pick a real (non-sensitive) email thread. Summarize it, then draft a grounded reply, giving Gemini the facts it cannot guess. Edit into your voice before sending. Notice how much faster starting from a draft is than from a blank reply.

- Open the Gmail side panel on a long thread: 'Summarize this thread and list the decisions and any open questions.'

- 'Draft a reply that answers the open questions; I can meet the 15th and need their final numbers first.'

- 'Make this draft about 30% shorter and a touch more formal,' then verify every fact before sending.

Worksheet: Document Brief (Notes to Doc)

Complete every field before prompting in Docs. The quality of the draft tracks the quality of this brief. Reuse this template for proposals, briefs, updates, and reports.

Document type and goal (what it must achieve)

Audience (who reads it, and their level of detail)

Must-include points or data (paste your rough notes here)

Structure / sections I want (e.g. background, approach, timeline, budget)

Tone (e.g. professional but plain, warm, formal)

Target length

Facts to verify after drafting (figures, names, dates)

Exercise: Ground Gemini in Your Own Files with @

Use the @-file picker to make Gemini answer from your real content instead of general knowledge. Name the exact file, ask a specific question, and verify the answer against the source. This is the single habit that makes Gemini feel genuinely useful at work.

- In the side panel, type @ and select a real document: 'Summarize the key risks and deadlines in @[your file].'

- Reference a spreadsheet: 'Based on @[your pricing sheet], draft a quote for 200 units in a friendly email.'

- Compare two files: 'Compare @[Proposal A] and @[Proposal B] and list where they differ on price and scope.'

Checklist: Writing-Workflow Checklist

- Gave Gemini the facts it cannot guess (dates, names, decisions) before drafting
- Used the side panel (not the standalone app) when the task was about the open email or doc
- Outlined the structure first, then drafted from the approved outline in Docs
- Grounded answers in real files with @ whenever the content should come from my Drive
- Read the full output and verified every fact before sending or sharing

Sheets and Slides: Data and Decks

Build a plain-English data-analysis and charting playbook for Sheets and a slide-and-image routine for Slides, with verification at every number.

Exercise: Interrogate a Spreadsheet in Plain English

Open a spreadsheet with clear headers. Ask questions in the side panel, request a formula you can keep, and spot-check every answer against the cells. The point is to interrogate data without remembering formula syntax — while still verifying.

- 'Which region had the highest total sales, and how did this quarter compare to last quarter?'

- 'Write a formula to total revenue for the West region in Q2 (SUMIFS), and explain it in one line.'

- 'Add a column that labels each row as Lead, Customer, or Churned based on the notes column.'

Worksheet: Sheets Analysis Plan

Plan the analysis before prompting so Gemini reads your data correctly and you know what to verify. Messy headers produce confidently wrong answers, so tidy them first.

The question I am trying to answer with this data

Key columns and exactly what each header means

Data-quality fixes needed first (duplicates, date formats, split columns)

Chart I want and its type (bar, line, pie) and what it should show

Numbers I must double-check before acting on the result

Exercise: Build Slides Content and a Visual

Outline the deck first, then move slide by slide using the side panel to write tight copy and speaker notes, and generate one image with a specific style prompt. Remember Gemini writes and illustrates; you own layout, branding, and flow.

- 'Summarize this section into 3-4 concise, parallel bullet points for one slide.'
 - 'Write confident, conversational speaker notes for this slide on the quarterly results.'
 - 'Create a flat-illustration image of a person reviewing charts on a laptop, clean modern style.'
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Checklist: Data-and-Decks Checklist

- Spreadsheet has clean, consistent headers before I ask Gemini anything
- Spot-checked every Gemini answer and chart against the actual cells and axes
- Kept any useful formula Gemini wrote, with its one-line explanation, for reuse
- Outlined the deck first, then drafted bullets and speaker notes slide by slide
- Avoided AI images for accuracy-critical visuals and checked the style fits the brand

Meet, Workflows, and Working Well

Turn on automatic meeting notes, assemble Gemini into repeatable cross-app workflows, and lock in the prompting recipe and limits that keep it reliable.

Exercise: Run a Meeting That Records Itself

In a real or test meeting, turn on 'Take notes for me' so everyone is notified, state action items aloud, then correct the generated recap. Accurate, owned action items matter more than a perfect transcript.

- Before the call, confirm 'Take notes for me' is available and you have permission, then turn it on.
 - During the call, state action items explicitly: 'Maria will send the draft by Friday.'
 - After the call, open the notes doc, fix any misheard names or facts, and share the verified recap.
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Worksheet: Cross-App Workflow Designer

Design one repeatable workflow that spans Workspace apps, naming the standardized inputs so @ references stay stable. A workflow is only valuable if you can run it the same way every time. The recurring task (e.g. weekly client update, meeting follow-up, data report)

Step 1 app and prompt (e.g. summarize the thread in Gmail)

Step 2 app and prompt (e.g. pull numbers from @[named Sheet])

Step 3 app and prompt (e.g. draft the update in Docs from both)

Standardized input locations (exact file names / folders for @ grounding)

Verification points (what I check at each handoff before continuing)

Exercise: Practice the Role-Task-Context-Format Recipe

Rewrite three vague prompts using the four-part recipe — role, task, context, format — and compare the results to a bare version. Then refine each output conversationally instead of starting over.

- Role + task + context + format: 'You are my executive assistant. Draft a polite decline to this vendor we did not choose. Two short paragraphs, warm tone.'
- 'Now make it warmer and add one line keeping the door open for next quarter.'
- Add audience and tone to a Docs prompt ('for my boss' vs 'for the team') and note how the draft changes.

Checklist: Reliable-Use Checklist

- [] Prompt with role, task, context, and format for anything that matters
- [] Refine the output conversationally rather than accepting a weak first try
- [] Saved the prompts that worked into a personal library for reuse
- [] Standardized file names and folders so cross-app @ grounding stays reliable
- [] Routed legal, financial, and medical judgments through a qualified human, never Gemini alone

Your Action Plan

1. Complete the access-and-surface setup sheet and fix any missing features with your admin or by switching accounts.
2. Write your data-governance and verification policy: what data is allowed, which account holds confidential work, and what you always check before sending.
3. Practice picking the right Gemini surface until app vs. side panel vs. in-line helper is automatic.
4. Build a Gmail workflow: summarize a long thread, draft a grounded reply, then shorten and verify before sending.
5. Adopt @-grounding in Docs and the side panel so Gemini answers from your real Drive files, and verify against the source.
6. Interrogate one real spreadsheet in plain English, keep the formula Gemini writes, and spot-check every number.
7. Generate a slide deck's bullets, speaker notes, and one image, then do the layout and branding yourself.
8. Turn on 'Take notes for me' in a meeting, state action items aloud, and correct the recap before sharing.
9. Design and run one cross-app workflow (e.g. weekly update) end to end, standardizing the input files for @.
10. Save every prompt that worked into a personal prompt library and refine the wording over the next few weeks.

