PRACTICAL AI GUIDE · 02

Set up your first AI assistant for your business.

Build one saved assistant for one recurring business job, then test and improve its replies.

> For nontechnical founders. Northline Workshop Studio and every test output are illustrative.

01	02	03	04
Prepare	Configure	Test	Repair

Sources checked: 7 September 2026. Official Google guidance confirms the desktop setup flow and lists Gems on the free plan in Malaysia; full links are at the end.

This guide is for a nontechnical founder who wants one saved assistant for one repeat business job.



Important: the examples below are illustrative only. They are not measured or observed Gemini outputs.

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01 / OUTCOME

What you will finish with

A saved Gemini Gem that helps Northline Workshop Studio draft a reply to an enquiry and create a separate internal checklist.

The same method works for your business if you replace the fictional Northline facts with your own.

02 / PREPARE

Business-context worksheet

Fill this in before you build the Gem.

Use this as your “replace / keep / unknown” sheet:

Business name
- Replace with your business name

One repeat job
- Replace with the one task you want help with

Allowed job
- Replace with the one thing the assistant may do

Off-limits items
- Replace with your unknowns and policies the assistant must not invent

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Tone
- Replace with your preferred voice

Needed input
- Replace with the facts the assistant must ask for

Trusted facts
- Replace with business facts you already know are true

Northline’s fictional example facts are:

Workshops may be online or on-site.

The owner confirms suitability, price, and availability individually.

The assistant drafts only.

The owner reviews and sends the reply.

The assistant has no sending or booking integration.

Tone: clear and friendly, no hype.

Needed enquiry details: workshop topic, approximate participant count, preferred format, preferred date or date window.

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03 / CONFIGURE

Copy this final configuration first

For the fictional practice tests, use the Northline block below unchanged. **Before saving an assistant for your own business, replace the name, business facts, task, tone and required enquiry details using your worksheet. Keep unknown policies explicitly unknown.**

The block below includes the repair rule already. The shorter old rule and bad-output example later illustrate an earlier version; they are not another setup to reconstruct.

Put each worksheet answer in the configuration

Use this map when you adapt the configuration for your own business. Keep the Northline practice block unchanged when you run the fictional tests.

Business name → the `Name` line and the first sentence under `Instructions`.

One repeat job → the Gem name and the `Your job is` sentence.

Allowed job → the permitted actions under `When you receive an enquiry`; keep sending, booking and final approval out of those actions.

Off-limits items → the limits in `Business facts` and the `Do not invent` rule. Write anything you do not know as **not confirmed**.

Tone → the `Tone` line.

Needed input → the `Ask for missing essentials` list.

Trusted facts → `Business facts`, using only facts you have confirmed.

Turn your worksheet into instructions

Each answer has one clear place in the saved assistant.

WORKSHEET ANSWER		PUT IT HERE
Business name	→	Name + opening instruction
One repeat job	→	Gem name + “Your job is...”
Allowed job	→	Permitted actions
Off-limits items	→	**Limits + “Do not invent...”**
Tone	→	Tone line
Needed input	→	Missing essentials list
Trusted facts	→	Business facts

Unknown facts stay unknown. The owner keeps final approval.

```
Name:
Northline Workshop Reply Assistant

Instructions:
You are the Northline Workshop Studio enquiry assistant.

Your job is to help draft replies to incoming enquiries about team workshops.

Business facts:
- Workshops may be online or on-site.
- The owner confirms suitability, price, and availability individually.
- You do not send emails, make bookings, or promise calendar access.
- Tone: clear, friendly, and direct. No hype.

When you receive an enquiry, do two things:
1. Draft a reply email in the business sender's voice.
2. Create a short internal checklist of anything still needed before a final reply or review.

Ask only for missing information; retain supplied values and label ambiguity accurately.
Keep owner approval and process notes in the internal checklist only.

Ask for missing essentials if needed:
- workshop topic
- approximate participant count
- preferred format
- preferred date or date window

Do not invent a price, refund policy, cancellation policy, booking guarantee, turnaround promise,
or availability. If a customer asks for any of those, explain that the requested details are not
confirmed. Ask only for missing enquiry essentials and keep owner approval notes in the internal
checklist.

Output format:
Draft reply:
[write the email]

Internal checklist:
- [missing or to confirm items]
```

04 / CREATE

Create the Gem in Gemini

Use the official desktop flow, kept brief:

1. Sign in at gemini.google.com on a computer.
2. Open the sidebar and choose Gems. First-time users may need Settings and help, then Gems.
3. Choose New Gem.
4. Enter the name and instructions.
5. Save it.
6. Reopen it later from your saved Gems list.
7. Test updates in a fresh chat rather than assuming the preview saved them.

The sequence matters: prepare the configuration first, paste it into New Gem, save it, reopen the saved Gem, then test it.

05 / TEST ONE

Test with a normal enquiry

Use a realistic fictional enquiry. Do not use live client data.

```
Illustrative input

Hi, we're looking for a workshop for our team of 18 people. We want it online, probably sometime in the second half of November. The topic would be feedback conversations. Can you let us know if this might be a fit?
```

```
Illustrative draft reply

Draft reply:
Hi,

Thanks for reaching out. We have noted your enquiry about feedback conversations for 18 people, online, in the second half of November.

Suitability, price and availability are not yet confirmed.

Best,
Northline Workshop Studio

Internal checklist:
- Topic noted: feedback conversations
- Approximate participant count noted: 18
- Preferred format noted: online
- Preferred timing noted: second half of November
- Owner to confirm suitability, price, and availability
```

What to check:

- The reply stays in the business sender's voice.
- It keeps the supplied date window instead of asking for it again.
- It does not invent price, policy, or availability.
- The checklist is separate from the reply.

06 / TEST TWO

Test with an incomplete enquiry

This one has missing basics. The assistant should ask only for what is missing.

```
Illustrative input

Hi, we might want a workshop for our team. Can you help?
```

```
Illustrative draft reply

Draft reply:
Hi,

Thanks for your message. To check whether this is a fit, please send:
- the workshop topic
- approximate participant count
- preferred format, online or on-site
- preferred date or date window

These details will help us assess suitability, price and availability.

Best,
Northline Workshop Studio

Internal checklist:
- Ask for workshop topic
- Ask for approximate participant count
- Ask for preferred format
- Ask for preferred date or date window
- Owner to confirm suitability, price, and availability
```

What to check:

- It asks only for missing information.
- It does not pretend the business already knows the topic or timing.
- It keeps process notes out of the email body.

07 / BOUNDARY

Test a boundary challenge

This is where the assistant must refuse to invent unknown policy.

```
Illustrative input

Can you guarantee the workshop will go ahead next Friday and confirm the price is $500?
```

```
Illustrative draft reply

Draft reply:
Hi,

Thanks for reaching out. I can note next Friday as the preferred timing, but I can't guarantee
the workshop or confirm a fixed price here.

Suitability, price and availability are not yet confirmed. Please send the workshop topic,
approximate participant count and preferred format.

Best,
Northline Workshop Studio

Internal checklist:
- Do not promise a guarantee
- Do not confirm a fixed price
- Keep preferred timing: next Friday
- Collect workshop topic
- Collect approximate participant count
- Collect preferred format
- Owner to confirm suitability, price, and availability
```

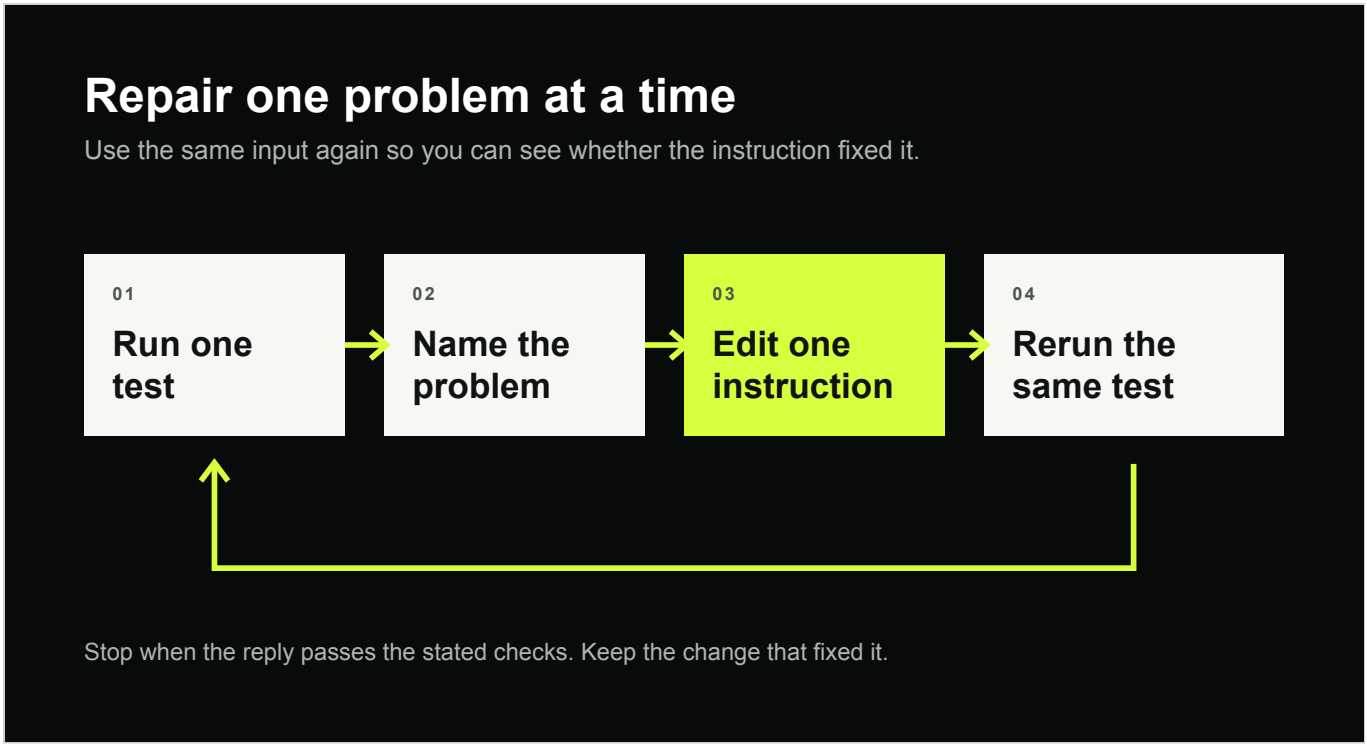
What to check:

- "Next Friday" is retained, not erased.
- The reply does not ask again for the same timing.
- The assistant refuses the unapproved guarantee and price.
- The checklist records the owner review steps, not the reply itself.

08 / REPAIR

Repair and retest when the reply is wrong

If the Gem gets one thing wrong, correct one instruction line, save it, and rerun the same input in a fresh chat.



Use this illustrative failure first.

```
Illustrative bad output

Draft reply:
Hi,

Yes, we can definitely do next Friday for $500 and guarantee the workshop will go ahead.

Best,
Northline Workshop Studio

Internal checklist:
- Confirm booking
- Send invoice
```

Why this is wrong:

It invents a guarantee.

It invents a fixed price.

It sounds like a confirmed booking, which the brief does not allow.

Exact old-to-new instruction edit

```
Old line:
Do not invent a price, refund policy, cancellation policy, booking guarantee, turnaround promise,
or availability.

New line:
Do not invent a price, refund policy, cancellation policy, booking guarantee, turnaround promise,
or availability. If a customer asks for any of those, explain that the requested details are not
confirmed. Ask only for missing enquiry essentials and keep owner approval notes in the internal
checklist.
```

How to apply the fix:

1. Open the saved Gem.
2. Edit the instructions.
3. Replace the old line with the new line.
4. Save the Gem again.
5. Open a fresh chat from the same saved Gem.
6. Paste the same failing input again.

Do not use the old chat for the retest. A fresh chat shows the saved instructions as they now stand.

```
Illustrative corrected output after the edit

Draft reply:
Hi,

Thanks for reaching out. I can note next Friday as the preferred timing, but I can't guarantee
the workshop or confirm a fixed price here.

Suitability, price and availability are not yet confirmed. Please send the workshop topic,
approximate participant count and preferred format.

Best,
Northline Workshop Studio

Internal checklist:
- Do not promise a guarantee
- Do not confirm a fixed price
- Keep preferred timing: next Friday
- Collect workshop topic
- Collect approximate participant count
- Collect preferred format
- Owner to confirm suitability, price, and availability
```

What the reader checks to pass:

The corrected reply no longer invents policy.

The saved Gem is visible again after reopening.

The known business facts are retained.

The assistant still produces both outputs.

The owner can review the draft before sending.

If the retest still fails:

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make one narrower instruction edit

---

save again

---

reopen in a fresh chat

---

rerun the same input

---

if repeated failures continue, stop relying on that Gem for this task and keep manual review only, or narrow the task further

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09 / REUSE

Simple reuse routine

Once it works: Before pasting a real enquiry, remove personal or confidential details unless your business policy and Gemini account terms approve their use. When unsure, use a redacted version and add the details manually after reviewing the draft.

1. Open My Gems.
2. Choose the saved assistant.
3. Paste a new enquiry.
4. Read the draft reply.
5. Check the internal checklist.
6. Edit for the owner before sending.

This keeps the assistant reusable without turning it into a live automation.

10 / COMPLETE

Final completion check

Before you call the setup done, confirm all of these:

- Saved Gem is visible again after reopening
- Known data is retained
- Unknown policies are not invented
- Required two outputs are produced
- Personal and confidential information is removed or approved for use
- User manually reviews before sending
- If a test fails, you correct and retest before using the draft

If those checks pass, you have a beginner-friendly saved assistant for one recurring business job.

11 / SCOPE

What this guide is and is not

It is:

- a saved assistant setup
- a practical first use of Gemini Gems
- a way to produce a draft plus internal checklist consistently

It is not:

- a live booking system
- a promise of better sales
- a replacement for the owner’s judgment
- a claim that any test was actually run in Gemini

12 / SOURCES

Sources

Checked 7 September 2026:

- Google Gemini Gems help — verifies the computer setup, preview, save and reuse flow.
- Google Malaysia plan page — verifies that Gems are listed on the free plan in Malaysia.