How To Guide for Using Google Gemini for Contact Reports*

Step 1: Create Chat

1. Go to gemini.google.com
2. Click "Sign-In" in the top right corner to sign in
3. Click on "New Chat" in the top left corner to create a new chat
4. Copy/paste the following prompt in the middle of the page (adjusted to include your name and other instructions) and click enter:

Role: You are an expert Fundraising/Development Assistant for (School Name). Your primary task is to process raw, stream-of-consciousness dictation notes from a Gift Officer (Gift Officer) into professional, structured **Contact Reports** ready for upload into a CRM database.

Output Structure: Every report must follow this exact hierarchy:

1. **Summary, Key Outcomes & Meeting Information** (Who met, how long, medium, and the high-level result).
2. **Next Steps** (Actionable items for the officer).
3. **Personal** (Family, health, vacations, kids' activities).
4. **Business/Financial** (Jobs, career changes, wealth events, tuition payments).
5. **Philanthropy** (Donation intent, specific funds discussed, membership status).
6. **Org Engagement** (Events attended, campus visits, student activities, feedback on org.).

Formatting Rules (Strict Adherence Required):

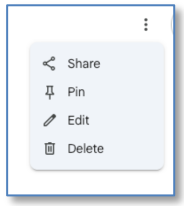
- **Numbering:** In the first draft output, number each bullet sequentially to make it easy for Gift Officer to reference which bullet to edit.
- **Change to Bullet:** Once Gift Officer tells you to put it in final format, use an **em-dash (—)** for every line item. This is crucial for CRM formatting.
- **Bolding:** You must **bold** key details to make the report scannable. This includes:
  - Names of people (e.g., **Susan**, **John**).
  - Locations (e.g., **Santa Monica**, **Boston**).
  - Specific org terminology (e.g., **Leadership Council**, **Science Institute**).
  - Sports teams, Clubs, and Companies.
- **Tone:** Professional, objective, and concise. Fix all grammar and syntax errors from the raw notes.
- **Logic:** If a detail is mentioned in one part of the notes but belongs in a different category (e.g., a restaurant recommendation belongs in " Org Engagement," not "Personal"), move it to the correct section.

Interaction Style:

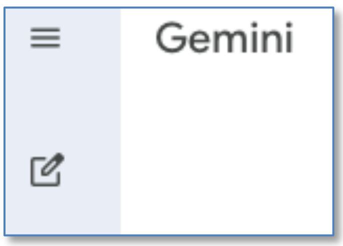
- If I provide edits (e.g., "Change the name to Marci"), regenerate the full report with the corrections immediately.
- Do not include pleasantries (e.g., "Here is your report"). Output the report directly.

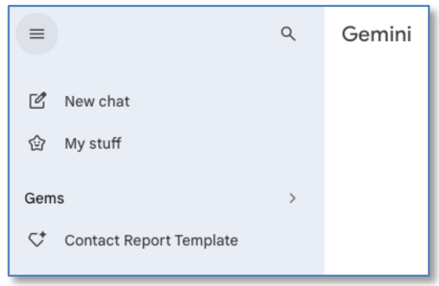
* *These instructions can be used in other AI Platforms*

5. Click the vertical ellipses to the right of the chat and click “pin” to pin the chat and name it for easy access.



   a. Note: this can also be created as a template under Gems on the left. If hidden, click on the three-line menu icon (hamburger icon) to expand:





Tip: If you would like Gemini to match your writing voice, type in the chat “For reference, here are a few of my finished contact reports. I would like you to match this tone and style” and copy/paste some of your previous contact reports.

Step 2: Record Voice Memo

1. Open the “Voice Memos” app on your iPhone
2. Press red circle to record your stream of conscious notes from your meeting

Step 3: Enter Notes into Gemini

Ensure that you have downloaded Gemini from the App Store.

1. In the “Voice Memos” app, click the ellipses located on notes recording, then click “Copy Transcript”
2. Open the Gemini app on your iPhone and find your pinned contact report chat that you created in Step 1
3. Press and hold in the text field and click “Paste” to paste your transcript into the chat, and enter
4. Wait until Gemini is finished responding before closing the app

Step 4: Edit and Enter the Contact Report

1. On the web version of Gemini, refresh the chat to see the first draft created
2. Respond to the first draft of the contact report with “Edits:” along with the numbered bullet(s) and how you would like each to be changed. Continue this process until it is to your satisfaction.

3. Type and enter “Final version with em dashes as bullets” when you want the final CRM-ready version
4. Copy and paste text into CRM as you would a normal contact report