Gemini in Google Sheets Activity: Generate a template

In this activity, you apply what you learned about Gemini in Google Sheets while acting as a sales representative for Cymbal Retail.

Cymbal Retail is about to begin selling its newest software product, Cymbal CRM. Cymbal CRM is a cloud-based customer relationship management (CRM) system that helps retailers improve their sales, marketing, and customer service.

With Cymbal CRM, you can:

- Track customer interactions and history.
- Manage your sales pipeline.
- Create and track marketing campaigns.
- Provide better customer service.

Task 1 - Generate a template

Use generative AI to generate a sales motion for Cymbal CRM.

Complete the following steps:

1. Open Google Sheets.
2. To open a new file, select **Start a new presentation > Blank spreadsheet**.
3. A **Help me organize** side panel will open. (If you do not see it, in the toolbar, you can select the **Help me organize** button.)
4. To generate a template, enter a prompt.

Directions: You want to generate a plan and strategy for selling Cymbal CRM. You want at least 15 different tasks in your plan.

5. Click **Create**.

   Note: The template might take several seconds to generate.

> **Check your work:** Does the template contain…
>
> ☐ Sales activity ideas
> ☐ At least 16 rows (one header row and at least 15 others)

6. Click **Insert**.

Task 2 – Refine a template

In this task, you edit a prompt or template to get better results.

Complete the following steps:

1. To open a new file, choose **File > New > Spreadsheet**.
2. A **Help me organize** side panel will open. (If you do not see it, in the toolbar, you can select the **Help me organize** button.)
3. To generate a template, enter the following prompt: **sales customer tracker for CRM**.

The provided template helps the Cymbal CRM sales team track different potential customers and the status of the sale.

4. Refine your template (you might choose to first insert your previous template or to overwrite it).

> **Directions:** After looking over the generated template, you decide that you also need the template to track which features apply to each company. You want the template to include a binary (yes/no, true/false, or checkbox) column for each of Cybal CRM's four features.
>
> *Tip: You might need to include portions of the product description (defined earlier in this exercise) in the prompt.*

Check your work: Does the template keep track of…
- ☐ The company name
- ☐ The stage of the sale
- ☐ A contact person at the company
- ☐ Four separate columns (one for each feature) determining whether the company is interested in the feature