

AI Tools Guide

Make AI Work for You · Compiled from the 2026 Mentor Seminar

MHG Charitable Foundation

Foreword

This guide is compiled from the 2026 Mentor Seminar · AI Edition and summarizes the most commonly used categories of AI tools, along with how to use each one. Detailed step-by-step tutorials for NotebookLM and Claude Cowork are included at the end for mentors and students to follow along.

1. Conversational AI Assistants (Everyday Use)

Examples: ChatGPT, Claude, Gemini, Copilot, Grok

How to use: Just type your question. The clearer your prompt, the more useful the answer — a vague prompt gets a generic wall of text, while a well-structured prompt gets a tailored, useful answer.

The Prompt Recipe (R-G-C-F-E)

- R (Role) — e.g., “act as a financial coach” or “act as an editor”
- G (Goal) — what outcome you actually want
- C (Context) — your audience, constraints, or background
- F (Format) — table, bullet list, word limit, etc.
- E (Examples) — give a sample for the AI to follow

Principle: Don’t ask for more — ask more clearly. Then refine the answer through follow-up questions.

Six Everyday Uses

Use Case	Input	Output
Ask	A question	A clear answer
Summarize	A long email / article	Key points
Translate	English	Chinese (or another language)
Create	An idea	Image / flyer
Digest	A video	Summary
Produce	Notes	Docs / slides

2. Claude-Specific Features

Claude is more than a chatbot — it includes the following capability modules:

Feature	What It Does
Chat	Everyday Q&A conversation
Code	Writes and debugs code
Design	Creates slides and graphics
Cowork	A “digital coworker” that runs tasks on your computer (paid plan)
Skill	Packages a fixed workflow into a reusable “recipe”
Connector	Plugs into external apps and data such as Gmail, Drive, Slack
Plug-in	Connector + Skill bundled together, shareable with others

Formula: Skill (know-how) + Connector (access) = Plug-in (a complete, ready-to-share bundle).

MCP (Model Context Protocol)

MCP is an open standard introduced by Anthropic in 2024 — essentially the “USB-C for AI tools.” It lets any AI assistant (ChatGPT, Claude, Cursor, etc.) discover tools, take actions, and read data from outside services (such as Canva, Google Drive, GitHub, Slack) in one consistent way, without a custom integration for every app. At every layer, OAuth grants your permission to connect each account.

3. Learning Tools

Job	Tool	What It Does
Find	Perplexity	Find the right resources first
Capture	TurboScribe	Turn audio/video into text
Understand	NotebookLM	Build an AI study notebook around your own sources
Remember	Quizlet / Anki	Active recall + spaced repetition to retain knowledge
Apply	Gamma / Canva	Produce something to prove what you learned (slides/designs)

TurboScribe: Speech to Text

Great for turning any podcast or YouTube video into text you can read, search, and summarize — no technical skills required.

Step 1 Capture — copy the video/audio link, or save the audio file

Step 2 Transcribe — use the platform’s built-in captions, or upload to TurboScribe to generate a transcript

Step 3 Summarize — paste the transcript into Claude or ChatGPT and use the prompt below to extract key points

Step 4 Keep — store your notes in one folder to build a searchable personal library

The Universal Summary Prompt (Copy & Paste)

“Summarize this document. Give me:

- 1. The main point, in one sentence
- 2. The top 5 key ideas
- 3. Why it matters
- 4. The action or decision it leads to
- 5. Key facts: numbers, names, dates
- 6. Anything to verify or watch out for
- 7. A 60-second version for someone else

Rule: don’t add anything the document doesn’t say.”

4. Research & Search Tools

Perplexity — the Answer Engine

How to use: Ask it questions the way you would a search engine. It returns answers with cited sources, making it a good first stop for gathering material.

Consensus — an Academic Search Engine

How to use: Search across 200M+ peer-reviewed papers. Results show a Consensus Meter (Yes / Mixed / No) plus a study snapshot (sample size, method, result). Best for literature reviews, evidence checks, and student projects in health or policy.

Deep Research + Consensus

Deep Research alone: searches the open web broadly, but mixes in blogs and news — you have to judge each source yourself.

Deep Research + Consensus: searches only peer-reviewed papers, producing a cited, usable report — moving from raw information to grounded understanding.

5. Voice & Multimodal Tools

Examples: ElevenLabs (a voice specialist); OpenAI, Google, AWS (broader platforms)

How to use: Beyond speech-to-text, this category also covers voice cloning, speech-to-speech (which preserves your tone and emotion), dubbing, accessibility support, and voice-based customer service agents.

6. Finance Research Tools Overview

These are free Claude plugins installed in Cowork — each one packages an analyst's workflow into a ready-to-use tool:

Plugin	What It Does
Financial Analysis	Values any stock — DCF, comparables, full models
Equity Research	Finds and tracks investment ideas; screens and coverage notes
Earnings Reviewer	Turns quarterly results into a rating and price target
Market Researcher	Maps a whole sector — players, trends, valuations

Research flow: ① Market Researcher scans the sector → ② Equity Research shortlists names → ③ Financial Analysis builds a valuation model → ④ Earnings Reviewer checks results — then you make the final call.

Appendix A: NotebookLM Step-by-Step Tutorial

NotebookLM is Google's "AI study room." Its defining feature is that every answer is grounded in the sources you upload yourself, with citations — it doesn't make things up (no hallucination).

Key Features

- Grounded, with citations
- Upload PDFs, web pages, or YouTube videos as sources
- Automatic study guides
- Automatic Audio & Video Overviews
- Mind maps & flashcards

Best Use Cases

- Digesting an entire course's worth of materials
- Turning lecture recordings/videos into study guides
- Summarizing long reports without hallucination
- Building a personal knowledge base

Step-by-Step Instructions

Step 1 Open NotebookLM and create a new notebook

Step 2 Upload your sources — these can be PDFs, web links, or YouTube video links

Step 3 Once the sources are processed, click "Generate Study Guide" for an automatic summary and key-point breakdown

Step 4 Click “Generate Mind Map” to visualize how the concepts relate to each other

Step 5 Click “Generate Audio/Video Overview” for a listenable or watchable walkthrough — great for reviewing on the go

Step 6 Click “Generate Flashcards” or “Generate Quiz” to self-test and reinforce memory

Step 7 When you ask a question, NotebookLM cites where the answer came from — click the citation to jump back and verify the source

Worked Example: Family Scam Defense & Cybersecurity Toolkit

After uploading a source pack on “family scam defense and cybersecurity,” NotebookLM can generate six study assets at once:

No.	Output	Purpose
01	Study Guide	Key concepts and summary
02	Mind Map	Visual web of how topics relate
03	Checklist	Steps to stay scam-safe
04	Audio/Video Intro	A listenable or watchable overview
05	Flashcards	Fast recall of key terms
06	Quiz	Test what you learned

Takeaway: upload once — understand, quiz, and review it all from one grounded notebook.

Appendix B: Claude Cowork Step-by-Step Tutorial

Cowork is a mode within the Claude desktop app — essentially a “digital coworker.” You set the goal; Claude thinks in the cloud and works on your computer (running code safely inside a sandbox), and it can call on connectors such as Gmail, Drive, and Slack, plus skills and plugins you’ve already installed. (Requires a paid plan.)

How It Works

- Your computer: a local folder handles files going in and out
- The Cowork app: the cockpit — where you set the goal and track progress
- Sandbox: an isolated Linux environment that runs code safely without touching your computer directly
- The cloud: the Claude model does the actual “thinking” in the cloud, accessing Gmail/Drive/Slack and other data through Connectors, and calling on previously saved Skills & Plugins

Setup (Using the Finance Plugins as an Example)

Step 1 Open the Claude desktop app → switch the mode from “Chat” to “Cowork”

Step 2 Go to the Marketplace → click “Customize” → “Browse plugins”

Step 3 Paste in Anthropic’s official GitHub link to load the list of available plugins

Step 4 Search for and install these four plugins: Financial Analysis, Equity Research, Earnings Reviewer, and Market Researcher

Step 5 Once installed, type “/” to bring up the command menu, or simply ask in plain English — for example, type “/initiate” and describe “initiate coverage on a company”

Typical Workflow: From a File to a Finished Report

Example scenario: hand Claude a Q3 business data file and let it carry the whole process from analysis through design.

Step	Action	Output
1 · Ask	Upload the file and state your analysis needs	A business brief
2 · Analyze	Dig into the data	5 key insights, 3 risk factors
3 · Build	Turn it into a visual result	A live dashboard
4 · Design (requires a connector)	Use the Canva connector to polish the layout	A one-page Canva design

Two Ways to Drive It: Your Own Prompt vs. a Prebuilt Skill

Approach	Example	Advantage
A · Your own prompt	“Summarize this S-1 filing for me — business, segments, use of proceeds, top risks, and 5 questions to ask first.”	No setup needed, maximum flexibility, you control the depth
B · Prebuilt skill (e.g., /initiate)	Type “/initiate” and describe “initiate coverage on this company from the uploaded S-1”	One command runs the full workflow — structured and repeatable

A skill typically chains together several analyst tasks — for example, “Company Research → Financial Modeling (a 6-tab Excel model) → Valuation Analysis (DCF/comparables) → Chart Generation → Report Assembly” — and runs them automatically in sequence.

Tips for Use

- Try a simple prompt in Chat mode first to clarify what you need, then switch to Cowork to run the full workflow
- For financial modeling tasks, run each task in order (build the model before valuing it) to avoid valuations built on placeholder data
- Cowork shines when you want “one command, one finished analyst workflow”; for flexible, one-off exploration, regular Chat mode is enough

- Every time you connect Gmail, Drive, Slack, or another account, you'll need to grant access via OAuth — review the permissions carefully

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