WINNING LIFESTYLES ONLINE

THE AI LIGHTKEEPER

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Notes, Numbers and a Second Look

A note-taker that lets me listen, Claude inside my spreadsheet, the videos I make with AI, and a plain-language word about agents.

I lead. AI supports.

Clarity. Confidence. Capability. Choice.



From my desk to yours

A note from Louella's desk.

November already! It has been a very busy year, with a number of projects on the go.

I entered the world of AI like a person fumbling in the dark. I found my footing, then I listened, studied, learned and began to teach. As I learned, AI advanced, and I went from walking to speed walking.

I can't chase every new AI tool, but I take a deep dive into any that touch my world and will most likely touch yours. I share a few with you each month, and most of them I use in my business.

This month was a lot of fun. I launched new publications, made new videos, and updated two of my courses for the second time, because AI has changed so much. I will keep updating them as AI changes.

I went from walking to speed walking.



Inside this issue

- Be in the conversation: Granola, and a word on recording people
- What I Tested: Claude in Google Sheets, with a cheat sheet
- Also this month: AI as my publishing assistant
- When a message doesn't look right
- How I actually use it: HeyGen
- Meet Willa
- A word about agents
- Willa's Whispers

A note-taker that lets me listen

Granola, and a word on recording people.

I'm crummy at taking notes when I'm trying to listen intently, so Granola caught my eye. It sits on your computer and transcribes the meeting while you listen. Afterwards it turns your rough notes into tidy ones, and you can ask it questions about the meeting. I typed a few questions during the demo, and it answered them. They have phone apps for in-person meetings too.

Two settings to change first, under Settings, Preferences, Data and sharing: restrict who can open your shared notes, and opt out of your notes being used to train Granola's AI.

And one courtesy: Granola works quietly, so tell people you're using it. "I use a note-taker so I can listen properly. Is that all right with you?" That matters even more in person.

A word on recording people. I personally am not for the wearables if they record conversations without people knowing they are being recorded. That, in my mind, is an invasion of privacy and downright rude!



A note-taker you are open about is a help. One that listens in secret is not.

Claude in Google Sheets

Trying something new, one step at a time.

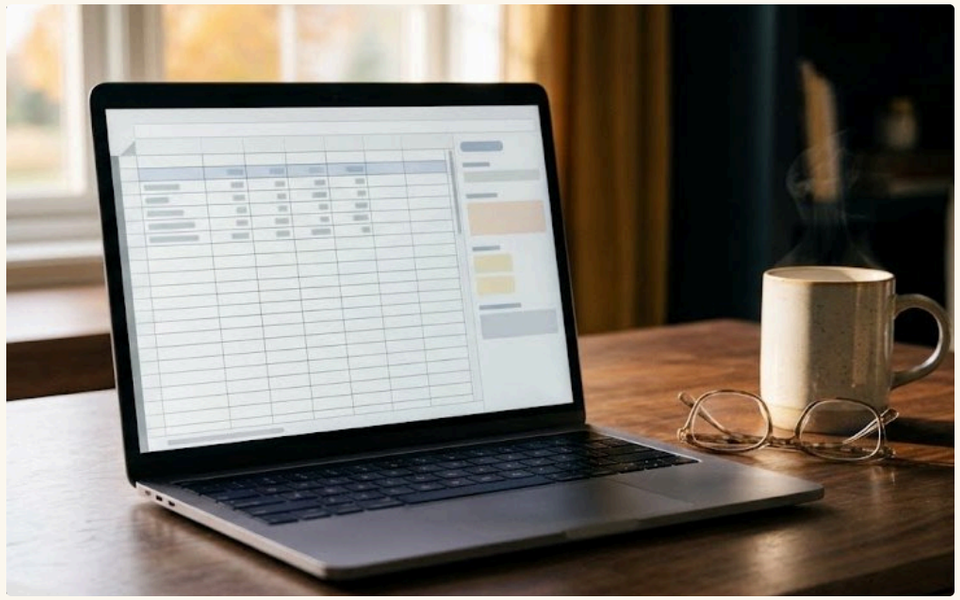
This month I tried Claude in Google Sheets, and I also had my own Claude with me. Google Sheets are not my area of expertise, so I went in gingerly. I saw right away that this was going to really help my work in the future.

I followed the instructions in the app, and I had my Claude alongside so I didn't click the wrong keys. I still managed to click something and remove a heading! Thank goodness I was given another tool for the Typo Queen that I am.

Ctrl + Z undoes your last step.

Ctrl + Y brings it back.

I'll be needing those in the future.



A NOTE BEFORE YOU INSTALL

There are a number of other apps using Claude's name. Pick the one with the orange Claude logo that says **Anthropic** underneath.

Claude in your Google Sheets

Keep this page beside you as you try it.

You'll need a Google account. Google Sheets is free with it.

1. Type **sheets.google.com** into your browser and open a blank spreadsheet.
2. In the menu bar at the top, click **Extensions**, then **Add-ons**, then **Get add-ons**.
3. Type **Claude** in the search bar. Lots of apps using Claude will come up. Pick the one by **Anthropic** and click **Install**.
4. Choose the Google account that is yours. I used my personal account.
5. When you see Permissions, read them and click **Allow**.
6. Go back to **Extensions**, then **Claude**, then **Open Claude**, and log in to your Claude account.

TRY IT: FIND THE MISTAKE

Type this little table into your sheet, starting in the top left corner (cell A1):

	A	B
1	Coffee	12
2	Lunch	25
3	Taxi	18
4	Total	=SUM(B1:B2)

Then ask Claude: "Check my formula. Is there a mistake? Don't change anything yet, just tell me."

The answer: the total skips the taxi. It should be =SUM(B1:B3), which gives 55, not 37.

How well did it work?

A made-up workshop budget, checked by me.

Very well. I practised on a made-up workshop budget with three mistakes hidden in it. Claude explained the budget in plain language and found all three on the first try. It even raised a fourth question I hadn't planted, about supplies bought for 20 people when only 15 tickets were sold. When I asked, it fixed the three mistakes, explained each change and gave me the new figures. Then I did my own check: the numbers were right.

Missed errors: none. Incorrect suggestions: none. One figure it gave early on was right for the sheet at that moment, but changed once the fixes went in. Claude caught that itself and explained it. One test isn't proof it never makes mistakes, which is why I still check.

AI did the work. I made the decisions.

GOOD TO KNOW

Claude in Google Sheets is still in beta and needs a paid Claude plan (Pro or above). One install covers Google Docs, Sheets and Slides. Look for it under **Extensions** in each.

It works in native Google files. Word, Excel and PowerPoint files need converting first, even if you open them through Google. Keep your original and check the result after converting.

A helpful explanation still needs the person who understands the worksheet. That's you.

AI as my publishing assistant

Learning the process while the work gets done.

This month I also tested working with AI to get my books published on Amazon and my journals listed on Etsy and Payhip. It's time-consuming work, so I let AI do a lot of it. It knew exactly where to go and what to do. I watched intently the whole way through, so I learned the process too.

If you'd like to see the results, you'll find my books and journals at **winninglifestylesonline.com**.

I watched intently the whole way through, so I learned the process too.



A second look before you click

Let AI help you read it first.

I received quite a few scams this month. Each time, I simply took the message to Claude, Claude deciphered it for me, and I sent it to the phishing or scam folder.

I do have a security system on my computer, but some emails still get through. When I don't recognise something, I don't open it.

When I don't recognise something, I don't open it.



TRY IT YOURSELF

Copy the message text into your AI assistant without clicking anything in it, and ask, "Is this a scam? What are the warning signs?" Leave out your own account numbers and passwords.

HeyGen

My words, my voice, my teaching videos.

I really enjoy working with HeyGen. I've made a number of short videos with it for my courses and my website, and they are fun to do.

Here is how it works for me. I start with a photo of the person who will appear in the video, which most of the time is me. It's great to be able to pick a picture of yourself you actually like. I've cloned my voice too. It's close, but not perfect. I give it a script and voilà, I have a video. I can edit it and change anything I like, and when I'm happy, one click and it's downloaded and ready to use in my business.

What about Higgsfield and CapCut?

In September I said I'd look at these two. I've seen them used in training programmes I've taken. They're built for videos with much more movement, and those need extra editing. For the simple, clear teaching videos I make, I can't see myself needing them much. However, you never know where the world will direct me next. I wasn't planning on being here checking out the advancement of AI either!



When I use an avatar, it's me, the words are mine, and I say so.

A friendly helper along the way

The AI guide for Winning Lifestyles Online.

I really enjoy having Willa in my AI world. Willa is the AI guide for Winning Lifestyles Online. I wanted a friendly AI that could make learning much more fun, so she pops in from time to time in the courses with advice and a bit of instruction.

She works directly under me. I'm the guide for Winning Lifestyles Online, and Willa is my AI helper. Throughout the programmes she whispers thoughts to the students, little reminders that AI is with them along the journey.

I designed Willa in ChatGPT, trying a few versions until she felt right, and she now appears in some of my HeyGen videos.



Chatbots, agents and agentic AI

The difference, in plain language.

Most of what we share here is for people using AI at home and in small businesses. But AI is advancing rapidly, and in time we may all need to know and use more of the features AI companies release every day. The world is moving quickly into agents and agentic AI, which provide multiple services to businesses. Here's the difference, in plain language.

THE CHATBOT

The AI most of us use now. Chatbots are brilliant resources for the world's information. You type a question into the chat window and it answers: "What are the prices for a return flight from Toronto to London?" You can keep the conversation going and ask which airline, what times and so on. Be careful, though: check that what it tells you is correct and current. AIs have been known to make mistakes.

AN AI AGENT

An assistant you send out to run errands. You give it a goal, a set of tools and permission to act: "Plan a 3-day trip to London under $1,500." If you've given it permission, it can plan the trip and even make the booking.

My rule: let it draft and plan. Payments and the final click stay with you.

AGENTIC AI

Agents working as a team. These systems run whole workflows. They plan, use tools, correct themselves and complete tasks with many steps. Often several agents work together, each with its own role. Most of these systems are used by larger businesses for now.

This is general information. I'm sharing it because agents are coming up so often in the news. If you'd like to know more, send me an email, and we can cover some of this in a future issue.

Keep your light on

What caught your interest?

What caught your interest in this issue? Write back and tell me at **info@winninglifestylesonline.com**.

Your Lightkeeper,
Louella

This November issue reflects tools and experiences from my own work during October. Features, prices and availability change, so check the latest details before you try or buy. Illustrations created with AI.

Sources: Granola security and data settings. Claude Help Center, "Use Claude in Google Docs, Sheets and Slides." Both rechecked 29 October 2026.



WILLA'S WHISPERS

Before you let any AI helper in, ask two questions: **what can it see, and what can it change?** You decide the answers.



THE AI LIGHTKEEPER

Until next month...
keep your light on.

Winning Lifestyles Online
winninglifestylesonline.com
info@winninglifestylesonline.com

Clarity. Confidence. Capability. Choice.