

# Research, Grounding, and Execution Guide

ChatGPT, NotebookLM, and Codex together

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## A simple guide for using ChatGPT, NotebookLM, and Codex together

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This guide explains how to use three AI tools together in a simple and practical way:

- ChatGPT
- NotebookLM
- Codex

Each tool is good at a different kind of work.

If you use them in the right order, you can move from a rough idea to a polished output with less confusion and better results.

This guide is written for non-technical business users. You do not need to be a developer to follow it.

### The simple idea

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Think of the three tools like this:

- ChatGPT helps you think
- NotebookLM helps you ground
- Codex helps you build

That is the heart of this workflow.

Use ChatGPT for early thinking and light work. Use NotebookLM when you need answers tied to real source material. Use Codex when you want the heavy lifting done in a clean, organized way.

### What each tool is best at

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#### ChatGPT

Best for:

- brainstorming
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- asking questions
- turning messy ideas into clear prompts
- rewriting instructions
- shortening or improving prompts
- outlining workflows
- drafting first-pass messaging

ChatGPT is a great starting point when you are still figuring out what you want.

## NotebookLM

Best for:

- reading uploaded sources
- answering questions from those sources
- comparing documents
- summarizing source material
- building grounded notes
- finding what is and is not supported by the sources

NotebookLM is best when truth needs to come from the documents you gave it, not from general AI knowledge.

## Codex

Best for:

- handling a folder of files
- following detailed instructions
- turning research into deliverables
- building structured outputs
- creating polished packages
- doing the heavy lifting after the research is ready

Codex is strongest when the inputs are already organized and grounded.

## Decision matrix

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Use this table when deciding where to start.

Task	Best Tool	Why
I have a rough idea and need help shaping it	ChatGPT	Best for brainstorming and turning vague ideas into usable prompts
I need to shorten or improve a prompt	ChatGPT	Fast at rewriting and cleaning up instructions

Task	Best Tool	Why
I want answers based only on uploaded files	NotebookLM	Best for grounded answers tied to source material
I need to compare several documents and spot patterns	NotebookLM	Strong at reading across a source set
I want to create a research notebook I can work from	NotebookLM	Good for gathering and organizing sources
I have a folder of research files and want a full output package	Codex	Best for structured, multi-file execution
I need polished documents, decks, or spreadsheets	Codex	Strong at turning grounded inputs into deliverables
I need quick wording help for an email or note	ChatGPT	Good for light drafting and rewrite support
I need a grounded truth summary for one company, client, or topic	NotebookLM	Best for source-based summaries
I need the final heavy lifting done	Codex	Best for end-to-end execution once the source work is ready

## When to use each tool

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### Use ChatGPT when:

- you are starting from scratch
- your notes are messy
- you need a better prompt
- you want a clearer workflow
- you are doing light drafting
- you want to think through options quickly

### Use NotebookLM when:

- you already have sources
- accuracy matters
- you want to avoid guessing
- you need source-backed notes
- you want to build grounded summaries
- you want to ask questions about a set of files

### Use Codex when:

- your files are collected and organized
- you know what outputs you want
- you want deliverables, not just ideas

- you need a bigger package built from many files
- you want structured work such as briefs, reports, decks, spreadsheets, or workflow documents

## A simple workflow that works well

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Here is the easiest way to think about the full process:

1. Start in ChatGPT.
2. Move to NotebookLM.
3. Finish in Codex.

This order usually gives the best results.

## Step 1: Start in ChatGPT for light work

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Use ChatGPT first when your idea is still early.

Ask it to help you:

- define the goal
- clarify the audience
- outline the steps
- create a prompt for another tool
- shorten a long prompt
- rewrite something in plain English

Examples:

- "Help me turn this rough idea into a research prompt."
- "Make this prompt shorter but still complete."
- "Write a reusable prompt template for this process."
- "Turn this into a simpler workflow for non-technical users."

At this stage, do not expect perfect grounded truth. This is the thinking and shaping stage.

## Step 2: Move to NotebookLM for grounded work

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Once you have documents, notes, exports, transcripts, websites, or research files, move into NotebookLM.

Use NotebookLM to:

- gather and review source material
- ask questions only from those sources
- build source maps

• create grounded summaries

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- compare what different files say
- spot gaps, conflicts, and weak evidence

This is where you move from ideas to evidence.

A good rule:

If the answer needs to be tied to files, use NotebookLM.

### Step 3: Use Codex for heavy lifting

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Once your source material is organized, hand it to Codex.

Codex works best when you give it:

- a clean folder
- clear instructions
- grounded source files
- the output format you want

Examples of heavy lifting:

- building an SOP
- creating a campaign package
- writing a set of briefs
- turning notes into a slide deck
- organizing research into spreadsheets
- creating website-ready files

This is the execution stage.

### The three levels of work

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Another easy way to remember this is:

- light work = ChatGPT
- grounded work = NotebookLM
- heavy lifting = Codex

#### Light work

Light work includes:

- brainstorming
- naming
- outlining

- rewriting
- simplifying
- prompt writing
- quick messaging help

### **Grounded work**

Grounded work includes:

- source-based summaries
- truth checking
- document comparison
- evidence gathering
- note building
- finding what is missing

### **Heavy lifting**

Heavy lifting includes:

- final packages
- polished outputs
- files for leadership
- structured documents
- presentations
- spreadsheets
- end-to-end workflows

## **A practical example**

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Here is a simple example of how the three tools can work together.

### **Scenario**

You want to research a local market, understand the strongest prospects, and create an outreach package.

#### **Use ChatGPT to:**

- define what you are looking for
- create a research prompt
- improve the wording of your questions

#### **Use NotebookLM to:**

- load the sources

- summarize what the sources say
- create grounded profiles
- build a source map

### **Use Codex to:**

- take the research folder
- create briefs, decks, spreadsheets, and guides
- save the final files in a shareable format

## **Best practices**

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- Start simple.
- Keep prompts short and clear.
- Do not ask one tool to do every job.
- Use NotebookLM when source truth matters.
- Use Codex after the files are organized.
- Save important outputs as you go.
- Keep your folders clean and easy to understand.
- Review final outputs before sharing them.

## **Common mistakes to avoid**

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- using ChatGPT as if it were your source library
- skipping the grounding step
- giving Codex messy or incomplete files
- asking for final deliverables before the research is ready
- using prompts that are too long
- mixing facts with guesses
- forgetting which tool is best for which job

## **Quick cheat sheet**

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If you only remember one thing, remember this:

- Need help thinking? Use ChatGPT.
- Need help grounding? Use NotebookLM.
- Need help building? Use Codex.

## Fast decision guide

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Ask yourself these questions:

### 1. Am I still figuring out what I want?

Use ChatGPT.

### 2. Do I need answers based on actual files or sources?

Use NotebookLM.

### 3. Am I ready for polished outputs and final deliverables?

Use Codex.

## Suggested order for most business tasks

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This order works well for many use cases:

1. Use ChatGPT to shape the idea.
2. Use NotebookLM to ground the work.
3. Use Codex to do the heavy lifting.
4. Review the final outputs.
5. Publish, share, or present the results.

## Where this guide is useful

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This guide can help with:

- market research
- prospecting
- sales planning
- SOP creation
- internal documentation
- campaign planning
- meeting prep
- client research
- content organization
- workflow design

## Final reminder

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These tools work best as a team, not as replacements for each other.

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ChatGPT helps you think. NotebookLM helps you trust the source material. Codex helps you turn that work into something useful and polished.

When you use them in that order, the work usually becomes faster, cleaner, and easier to share.