Claude For Business

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FULL-DAY BUSINESS TRAINING WORKSHOP

Claude for Business

Getting the most out of Claude as a business user

SESSION 1

9:30 – 11:00

Foundations & Prompting

SESSION 2

11:15 – 13:00

Everyday Work & Power Features

SESSION 3

14:00 – 15:30

Governance & Adoption

Q&A and open clinic from 15:30

WELCOME

Your Day at a Glance

9:30 – 11:00	**Session 1 — Foundations & Prompting Mastery** The Claude landscape, how Claude compares to ChatGPT, Gemini and Copilot, choosing the right model, and the prompting techniques that separate average outputs from excellent ones.
11:00 – 11:15 · Coffee Break	
11:15 – 13:00	**Session 2 — Everyday Work & Power Features** Writing, editing, summarising and research. Long documents, meeting notes to actions, repeatable workflows — then the power features: Projects, Artifacts, Connectors and Skills.
13:00 – 14:00 · Lunch	
14:00 – 15:30	**Session 3 — Governance, Adoption & Real-World Application** GDPR and data privacy, what never to upload, safe team habits, common mistakes, Claude Code, real case examples — and building your personal 30-day adoption plan.
15:30 onwards	**Open Q&A + Prompt Clinic**

SESSION 1

9:30 – 11:00

Foundations & Prompting Mastery



BY THE END OF THIS SESSION YOU WILL BE ABLE TO:

1. Explain what Claude is and where it fits in a business context
2. Compare Claude with ChatGPT, Gemini and Copilot — and pick the right tool
3. Choose the right Claude model for each task
4. Write structured prompts that get excellent first drafts and iterate quickly

Who’s Who?

CMG Training
The Irish Institute of Professional Education

A quick around the house to know the audience

Are you Currently using AI or AI Tools?



SESSION 1 · FOUNDATIONS

What is Claude?

An AI Assistant

Claude is a large language model (LLM) built by Anthropic. It understands and generates natural language with exceptional nuance — reading, writing, analysing and reasoning across professional tasks.

Safety-First by Design

Built on Anthropic's Constitutional AI research. Claude is trained to be helpful, harmless and honest — a meaningful differentiator when deploying AI across a business.

Built for Business Work

Writing, research, analysis, data work, coding and complex multi-step reasoning. Available via web, mobile, desktop, API — and increasingly inside your existing tools.

Framing for today: treat Claude as a highly capable new colleague — brilliant, fast, but needs a proper brief and a review of its work.

SESSION 1 · FOUNDATIONS

Where Claude Fits in Your Business Context



Individual Productivity

First drafts, summaries, analysis, editing — the daily 30-to-90-minute tasks compressed into minutes. This is where most people start, and where ROI appears fastest.



Team Workflows

Shared Projects with company context, standard prompt templates, consistent tone across the team. Claude becomes part of how the team works, not one person's secret weapon.



Business Processes

Repeatable workflows: tender reviews, client onboarding packs, monthly reporting, compliance checks. Documented, reviewed, and owned like any other process.



Technical & Product (via API / Claude Code)

For organisations with developers: Claude embedded in products, internal tools and automation. Out of scope for today, but we will map where it fits this afternoon.

Claude vs ChatGPT, Gemini & Copilot

Consideration	Claude	ChatGPT	Gemini	Copilot
Long document handling	**Excellent — 200K+ tokens**	Good (128K)	Good (up to 1M)	Limited
Instruction following	**Very precise**	Strong	Good	Variable
Writing quality & tone	**Nuanced, natural**	Strong	Good	Good
Ecosystem fit	**Drive, Gmail, Calendar + API**	Widest plugin range	Google Workspace	Microsoft 365
Training on your data	**No (paid plans)**	Opt-out needed	Opt-out needed	Enterprise controls
Best pick when...	**Documents, writing, analysis, reasoning**	Broad general use	Deep in Google stack	Deep in Microsoft stack

The honest answer: these tools overlap heavily. Claude's edge is where documents, writing quality and careful reasoning matter most.

SESSION 1 · FOUNDATIONS

Strengths of Claude for Business Users

Long-Form Document Work

200,000+ token context — entire contracts, tender packs, policy suites in one conversation

Deep, Careful Reasoning

Multi-step analysis, strategic thinking, nuance — strongest where getting it wrong is costly

Writing Quality

Natural, precise language that adapts from board papers to casual Slack messages

Privacy Posture

Paid plans do not train on your data — a cleaner GDPR story out of the box

Instruction Following

Follows detailed, multi-part briefs with high fidelity — critical for templated workflows

Persistent Context

Projects, Skills and memory mean Claude learns your standards — brief once, reuse forever

Choosing the Right Claude Model

FAST & LIGHT

Haiku

Quick questions, simple rewrites, high-volume routine tasks

- Near-instant responses
- Lowest cost via API
- Great for short, well-defined tasks

THE WORKHORSE

Sonnet

Your daily driver — most business tasks, most of the time

- Excellent balance of speed and depth
- Strong writing and analysis
- Default choice for everyday work

MAXIMUM DEPTH

Opus

Complex reasoning, high-stakes documents, nuanced strategy

- Deepest reasoning capability
- Best for long, complex briefs
- Use when quality trumps speed

Rule of thumb: start with Sonnet. Drop to Haiku for volume, step up to Opus when the stakes or complexity justify the wait.

SESSION 1 · FOUNDATIONS

The New Top Tier — Claude Fable 5

Where it sits

Fable 5
Mythos-class

Opus
Deep reasoning

Sonnet
The workhorse

Haiku
Fast & light

What it is

The first model in Anthropic's Claude 5 family, and the first of a new Mythos-class tier that sits above Opus. Fable 5 is the most intelligent generally available Claude model — a step up in capability, not just an incremental version bump.

Fable 5 vs Mythos 5 — same model, different access

They share the same underlying model. Fable 5 is the generally available version with additional safety measures around dual-use capabilities. Mythos 5 is offered without those measures — to approved organisations only. For business users, Fable 5 is the one you will see and use.

When to reach for it

The same logic as Opus, one rung higher: your hardest reasoning, your highest-stakes documents, work where the quality ceiling matters more than speed or cost. Details and comparisons: anthropic.com/news/claude-fable-5-mythos-5

SESSION 1 · FOUNDATIONS

Fable 5 — Delayed by Government Mandate

Why Fable 5 Was Held Back

In a historic move, the United States government temporarily halted the public release of Anthropic's Claude Fable 5. This intervention marks the first time federal regulators have actively held back a commercial LLM due to its sheer cognitive leap.

The government's primary concerns centered on Fable 5's highly advanced autonomous reasoning, multi-step planning, and potential dual-use capabilities that could bypass traditional safety guardrails.

Anthropic cooperated fully with federal safety agencies, providing restricted access environments to finalize testing and establish rigorous, customized protocols prior to its general public release.

National Security & Safety Audit

The Department of Commerce and national security agencies triggered an emergency review to evaluate Fable 5's capability limits. Safety testing was mandated to ensure the model could not be weaponized or leveraged for advanced cyber-warfare operations.

Testing & The Path to Release

To address these concerns, Anthropic integrated additional safety layers and developed **Fable 5** as the generally available version with robust default safety constraints. Meanwhile, **Mythos 5** remains restricted strictly to vetted and approved government and research organizations.

SESSION 1 · PROMPTING MASTERY

How to Prompt Effectively — The C.R.A.F.T. Frame

C	**Context**	Who you are, the situation, what has happened. Claude cannot read your mind — brief it like a new colleague.
R	**Role**	Who should Claude be? A procurement specialist, an editor, a sceptical CFO. Roles sharply improve relevance.
A	**Audience & Aim**	Who reads the output, and what should it achieve? A board paper and a team update need different everything.
F	**Format**	Structure, length, headings, tone. Say exactly what shape you want — table, memo, 150 words, plain English.
T	**Test & Tighten**	Add an example to match, and constraints: what to avoid, what to always include, what quality bar applies.

Not every prompt needs all five — but every disappointing output is missing at least one.

SESSION 1 · PROMPTING MASTERY

Anatomy of a Great Prompt — Before & After

BEFORE — the one-liner

```
Write an email to staff about the new expenses policy.
```

Result: generic, wrong tone, misses key details, needs a full rewrite.

Result: usable on the first pass — 90 seconds of briefing saves 20 minutes of editing.

Live demo: we will run both versions now and compare outputs on screen.

AFTER — the C.R.A.F.T. version

```
I am the finance manager at a 60-person consultancy. We are introducing a new expenses policy on 1 August: receipts required for everything over EUR 25, claims within 30 days, new approval flow in our HR system.

Act as an internal comms specialist. Draft an all-staff email announcing this. Audience: busy consultants who skim email. Aim: compliance without grumbling.

Format: under 200 words, friendly but clear, 3 bullet points for the key changes, one line on why. Avoid corporate jargon.
```

Improving Outputs Through Iteration

The first output is a first draft. Iterating in the same conversation is faster than perfecting the prompt.

1	**Adjust the dial**	*Make it more concise. / More formal. / Simpler language. / Cut it to half the length.*
2	**Redirect the focus**	*Lead with the cost impact instead. / Reframe this for a sceptical audience. / Focus on risks, not benefits.*
3	**Ask for options**	*Give me three versions with different tones. / Show me a bolder and a safer alternative.*
4	**Make Claude critique itself**	*What is weak about this draft? / What would a picky client push back on? Now fix those issues.*
5	**Ask Claude to interview you**	*Before drafting, ask me 5 questions that would make this brief better. Then write it.*

HANDS-ON · 20 MINUTES

Exercise 1 — Your First C.R.A.F.T. Prompt

1. Pick a real writing task from your week — an email, an update, a summary you actually need to produce.
2. Write it as a one-line prompt first. Run it. Save the output.
3. Rewrite using C.R.A.F.T. — Context, Role, Audience & Aim, Format, Test & Tighten. Run it again.
4. Iterate twice using the moves from the last slide. Compare all three outputs.

Debrief: 2–3 volunteers share their before/after. Then — coffee break, back at 11:15.

Everyday Admin — Before & After (1 of 2)

Example 1 — Replying to a complaint email

BEFORE

```
Reply to this complaint email.

[paste email]
```

AFTER — C.R.A.F.T.

```
Context: I run customer service at a kitchen supplier. This delivery was 8 days late with one damaged item; a replacement is already dispatched.  Role: Experienced customer service manager.  Audience & Aim: Annoyed but reasonable customer - keep their business.  Format: Under 150 words; apologise once, state what we did, offer a 10% code.  Tighten: No cliches like 'we value your feedback'. [paste email]
```

Example 2 — Writing a job advert

BEFORE

```
Write a job ad for an office administrator.
```

AFTER — C.R.A.F.T.

```
Context: 25-person accountancy practice in Galway hiring our first dedicated office administrator.  Role: Recruitment copywriter who avoids cliches.  Audience & Aim: Experienced local administrators; quality applicants over volume.  Format: 250 words - hook opening, duties as 5 bullets, must-haves vs nice-to-haves, salary EUR 32-38k stated openly.  Tighten: No 'fast-paced environment' or 'wear many hats'; match the tone of this ad: [paste example]
```

Everyday Admin — Before & After (2 of 2)

Example 3 — Performance review template

BEFORE

Make me a performance review template.

AFTER — C.R.A.F.T.

Context: I lead a 6-person marketing team; no standard review format exists - I want one to reuse quarterly. Role: HR consultant designing practical, bias-aware reviews. Audience & Aim: Reviewer and team member - fair process producing a development plan, not just a score. Format: Reusable template: achievements vs objectives, strengths with evidence, growth areas framed constructively, 2 development goals, employee reflection. Tighten: Add 3 example phrases per section - and wording to avoid.

Example 4 — Chasing an overdue payment

BEFORE

Write an email chasing an unpaid invoice.

AFTER — C.R.A.F.T.

Context: Invoice #2214, EUR 4,800, 21 days overdue. Normally prompt client; second reminder - first got no reply. Role: Small-business owner, firm on payment, protective of the relationship. Audience & Aim: Their finance contact; payment within 7 days without souring things. Format: Under 120 words. Reference invoice number and due date, offer a call if there is an issue, state new work pauses if unresolved. Tighten: Two versions - one warm, one firmer - so I can choose.

Coffee Break



THE AI ROADMAP — THREE ERAS OF AI

Most organisations are in Era 1. Era 2 has already arrived. Era 3 is on the horizon.

ERA 1 · Chat AI

2022 — Now

WHERE MOST ORGANISATIONS ARE

→ You ask → it responds, one exchange at a time

→ Human initiates and controls every action

→ No memory between sessions; no tool access

→ Copilot in Word/Teams/Outlook, Claude in browser

e.g.

Ask Copilot to summarise meeting notes → it does. Done.

ERA 2 · Agentic AI

Now — Emerging

ALREADY ARRIVING

→ AI executes multi-step tasks without re-prompting

→ Uses tools: search, calendar, email, databases

→ Escalates to humans only when judgement needed

→ Copilot Studio agents, Microsoft 365 Workflows Agent

e.g.

One instruction → AI drafts brief, retrieves policy docs, emails summary.

ERA 3 · Autonomous AI

Horizon

ON THE HORIZON

→ Multiple AI agents collaborate on complex tasks

→ Persistent memory across sessions and systems

→ Monitors, adapts, and acts with minimal initiation

→ WEF (2026): governments piloting but governance critical

e.g.

AI monitors legislation, flags policy gaps, drafts updates — continuously.

SESSION 2

11:15 – 13:00

Everyday Work & Power Features

BY THE END OF THIS SESSION YOU WILL BE ABLE TO:

1. Apply Claude to email, meeting notes, reports and document work
2. Work confidently with long documents and multi-file analysis
3. Turn raw notes into actions, plans and repeatable workflows
4. Use Projects, Artifacts, Connectors and Skills to multiply your output

SESSION 2 · EVERYDAY WORK

Writing, Editing, Summarising & Research



Writing

- First drafts from bullet points
- Proposals, updates, announcements
- Tone-matched to your voice
- Multiple versions to choose from



Editing

- Tighten, clarify, restructure
- Plain-English rewrites of jargon
- Consistency across long documents
- Proofread with explained changes



Summarising

- Long reports to one page
- Email threads to decisions + actions
- Different summaries per audience
- Extract only what changed



Research

- Structured briefings on any topic
- Web search for current information
- Compare options with criteria tables
- Always verify key facts (more later)

SESSION 2 · EVERYDAY WORK

Deep Dive — Email Drafting That Sounds Like You

The technique

- Paste 2–3 emails you have actually sent — Claude learns your voice from examples, not descriptions
- State the relationship and history: first contact, ongoing client, difficult thread
- Say what outcome you want the email to produce, not just its topic
- For hard emails: ask for two strategies — for example, hold firm vs offer a compromise

Template to steal

```
Here are two emails I have written recently so
you can match my voice:
[paste email 1]
[paste email 2]

Now draft a reply to the email below.
Relationship: long-standing client, slightly
frustrated about a delay. Goal: acknowledge,
give a firm new date, protect the relationship.
Keep it under 120 words.

[paste the email to answer]
```

SESSION 2 · EVERYDAY WORK

Deep Dive — Meeting Notes, Minutes & Actions

1 Capture messy

Type rough notes during the meeting — fragments, shorthand, half-sentences. Do not tidy as you go; that is Claude's job.

2 One-shot transform

Paste with a standing prompt: summary, decisions, action items with owner and deadline, open questions flagged.

3 Sanity check

Scan the output against your memory. Fix names, correct any misattributed action. 60 seconds, not 20 minutes.

4 Distribute in-format

Ask for a version formatted for email, one for your project tracker, one 3-line update for your manager.

Standing prompt to save:

```
I will paste raw meeting notes. Produce: (1) a 3-line summary, (2) decisions made, (3) action items as [Owner] — [Action] — [Deadline], (4) open questions. If an owner or deadline is missing, flag it as TBC rather than guessing.
```

SESSION 2 · EVERYDAY WORK

Deep Dive — Reports & Document Work

Outline first, then draft

Ask for a structure before any prose: 'Propose an outline for a quarterly review covering X, Y, Z.' Approve or edit the skeleton, then have Claude draft section by section. Far better than fixing a wrong 5-page draft.

One source, many outputs

Write the full report once, then generate the derivatives: executive summary, board slide content, client-facing version, internal FYI. Each audience gets its own cut in minutes.

Review mode

Flip the direction: paste your own draft and ask Claude to review it as a demanding reader. 'What is unclear? What claims lack support? Where does the argument sag?' Then fix only what convinces you.

SESSION 2 · WORKING SMARTER

Long Documents & Files

What Claude handles

- PDFs, Word docs, spreadsheets, images and text files — drag and drop
- Entire contracts, tender packs or handbooks in one conversation (200K+ tokens)
- Multiple documents at once — compare, cross-reference, reconcile
- Extraction: every date, obligation, figure or clause of a given type
- Claude can also create files: Word, Excel, PowerPoint, PDF outputs

Worked example — contract review

1. Upload the contract PDF
2. Summarise the key obligations and risks for each party
3. List every payment term, deadline and notice period as a table
4. Flag any clause you would escalate to legal, with your reasoning
5. Draft 5 questions to raise with the counterparty

SESSION 2 · WORKING SMARTER

Research & Analysis Workflows

Market & Competitor Scans

Web-enabled research with a defined output: 'Build a one-page brief on [company]: offer, customers, differentiators, recent news. Cite sources.' Then verify the citations before sharing.

Spreadsheet & Data Analysis

Upload a CSV or Excel export. Ask for trends, outliers, segment comparisons and a plain-English narrative of what the numbers say — plus the caveats a careful analyst would add.

Options Appraisal

Give Claude the decision, the options and your criteria. Ask for a weighted comparison table plus a recommendation with its two strongest counter-arguments.

Synthesis Across Sources

Upload several reports or articles and ask: where do these sources agree, where do they conflict, and what does each uniquely contribute? Weeks of reading, structured in minutes.

SESSION 2 · WORKING SMARTER

Turning Notes into Actions & Plans

Any unstructured input — voice-note transcripts, brainstorm scribbles, a chaotic email thread — can become a structured plan.

Brain-dump of everything on your plate	>	**Prioritised task list with a suggested order and time estimates**
Rambling voice-note transcript from your commute	>	**Structured project brief: objective, scope, risks, next steps**
A messy thread of client emails	>	**Timeline of what was agreed, by whom, and what remains open**
Workshop flipchart photos (yes — images work)	>	**Themed summary with a proposed 90-day action plan**

Reusable Workflow Prompts (1 of 2)

A prompt you use twice is a template. A template your team uses is a workflow — build a shared library.

1	**Weekly Status Report**	`Every Friday I paste raw team notes. Convert to: Executive Summary / Wins / Blockers & Risks / Next Week Priorities. Concise, professional, for senior leadership.`
2	**Tender Compliance Screen**	`I will paste tender requirements and our draft response. Check every mandatory requirement is addressed, list gaps as a table, and flag any ambiguous wording to clarify with the buyer.`
3	**Client Onboarding Pack**	`New client: [name, sector, engagement type]. Generate our standard onboarding checklist, a tailored kickoff agenda, and a welcome email in our house tone.`
4	**New Starter Induction Pack**	`New hire: [name, role, team, start date]. Generate a 2-week induction schedule, a welcome email introducing them to the team, and a 'who to know and why' contact list based on our org chart.`

Continued on the next slide — 3 more workflows below.

Reusable Workflow Prompts (2 of 2)

Four workflows down, three to go — the same principle applies to almost any task you repeat.

5 Monthly Newsletter Draft

```
I will paste this month's project updates, wins and announcements. Draft a staff newsletter: a 2-line opener, 3 sections with subheads, one 'shout out' spotlight. Friendly, concise, no corporate cliches.
```

6 Supplier / Vendor Comparison

```
Compare these vendor proposals: [paste or attach]. Build a table scoring each against price, delivery time, support terms and risk. Recommend one option with the two strongest counter-arguments.
```

7 Risk Register Update

```
I will paste this month's project notes. Identify any new or changed risks, rate each Likelihood/Impact (Low/Med/High), and draft one-line mitigation actions. Flag anything that should escalate to leadership.
```

Seven templates, zero overlap. Where to store them: a shared doc works to start — Projects and Skills make them reusable at team scale.

SESSION 2 · WORKING SMARTER

Working with Data in Claude

Upload a spreadsheet, get working insights.

What Claude can do

- Upload .xlsx or .csv files directly — Claude reads the data
- Analyse trends, flag anomalies, summarise key figures
- Generate pivot-table-style summaries without touching Excel
- Draft a written report from raw data — board-ready in minutes
- Compare two datasets side by side
- Create charts and visualisations (Artifacts)

What it can't do (yet)

- Edit your spreadsheet directly — it produces new documents, not formulae in cells
- Run macros or VBA — it can write them for you, but you paste them back
- Access live data sources — you upload, it analyses

LIVE DEMO PROMPT

“I'm attaching our Q2 regional sales data. Act as a financial controller reviewing this for the board. Summarise the top 3 trends, flag anything unusual, and draft a 200-word executive summary suitable for a board paper. Use plain English, no jargon.”

SESSION 2 · WORKING SMARTER

Excel Analysis Prompt Template

A reusable C.R.A.F.T. template — swap the bracketed details for any spreadsheet you need analysed.

C	**Context**	I am [role] at [company]. I've attached a spreadsheet showing [what the data covers, e.g. Q2 sales by region].
R	**Role**	Act as a financial analyst.
A	**Aim**	Identify the key trends, flag any anomalies, and produce a written summary I can use in a [report type].
F	**Format**	3-5 key findings as bullets, a short narrative summary (max 200 words), and a table of any figures that need attention.
T	**Tighten**	Flag anything that looks like a data entry error, not a real trend. Round all figures to whole euros.

Save this one to the shared prompt library — it works for almost any spreadsheet analysis task.

SESSION 2 · POWER FEATURES

The Four Power Features — Overview

Projects

Persistent workspaces with your documents and instructions built in

Use when: recurring work for the same client, team or process

Artifacts

Claude builds working outputs — trackers, tools, templates, dashboards

Use when: you want a thing, not just text

Connectors

Claude reads and acts in Gmail, Drive, Calendar and more

Use when: the context lives in your inbox or files

Skills

Packaged company standards and processes Claude applies automatically

Use when: outputs must match your house style every time

SESSION 2 · POWER FEATURES

Deep Dive — Projects

What goes into a Project

- Project knowledge: upload style guides, templates, background docs, past examples
- Custom instructions: standing rules — tone, format, what to always or never do
- Multiple conversations that all share the same context
- Team sharing: colleagues get the same well-briefed Claude

Starter Projects that pay off fast

Client X

Contains: brief, contract, contact notes, tone guide

Weekly Reporting

Contains: report template, last 4 reports, audience notes

Proposals & Tenders

Contains: past winning bids, boilerplate, pricing rules

My Writing Voice

Contains: 10 samples of your best writing, dos and don'ts

SESSION 2 · POWER FEATURES

Deep Dive — Artifacts

Artifacts are standalone outputs Claude builds beside the chat — documents, tools and mini-apps you can use, edit and share.

Working tools

Pricing calculators, ROI estimators, quote generators — describe the logic, get a working tool

Dashboards & trackers

KPI dashboards from your data, project trackers, decision logs — interactive, not static

Documents & templates

Formatted reports, reusable templates, checklists — exportable to Word, Excel or PDF

Explainers & training aids

Interactive quizzes, process walkthroughs, onboarding guides your team can click through

Live demo: we will build a simple client-quote calculator artifact from scratch in under 3 minutes.

SESSION 2 · POWER FEATURES · LIVE DEMO

Watch: Building a Tool From a Single Prompt

We are going to build a working client quote calculator from scratch — no developer, no code, just a description.

WHAT WE ARE ASKING CLAUDE TO DO

“Build me a simple client quote calculator as an interactive tool. Inputs: number of consulting days, day rate, and a discount percentage. Show the subtotal, discount amount, VAT, and total.”

THREE THINGS TO WATCH FOR

The speed

From prompt to a working tool in under a minute — a real interactive calculator, not a mockup.

The interactivity

We will change the numbers live and watch it recalculate instantly, just like a real app.

It's yours to keep

Editable, exportable, shareable — this is a real artifact, not a one-off demo trick.

SESSION 2 · POWER FEATURES

Deep Dive — Connectors (Gmail, Drive, Calendar)



Gmail

- Summarise long threads and surface what needs a reply
- Draft responses in context of the whole conversation
- Find that email — by meaning, not keywords



Google Drive

- Search and summarise files without opening them
- Pull data from Sheets into analysis and reports
- Cross-reference documents scattered across folders



Calendar

- Prep briefings for tomorrow's meetings automatically
- Check availability and draft scheduling emails
- Weekly lookahead: what needs preparing, when

Governance note: connectors mean Claude can see live business data. Check what your organisation has approved before connecting work accounts — we cover the rules in Session 3.

SESSION 2 · POWER FEATURES

Deep Dive — Skills

What a Skill is

A packaged set of instructions, standards and reference material that Claude loads automatically when relevant — think of it as an SOP that Claude actually follows.

Where Projects hold context for one area of work, Skills encode how your company does something — everywhere, every time.

Skills vs Projects in one line:

Projects = the context of the work. Skills = the rules of the house.

Skills worth building first

Brand & Tone Skill

Voice, banned words, formatting rules — every output on-brand

Document Standards Skill

House templates for reports, proposals and memos

Compliance Checklist Skill

The checks that must run before anything client-facing ships

Data Handling Skill

What to anonymise, how to label drafts, escalation rules

Hands On

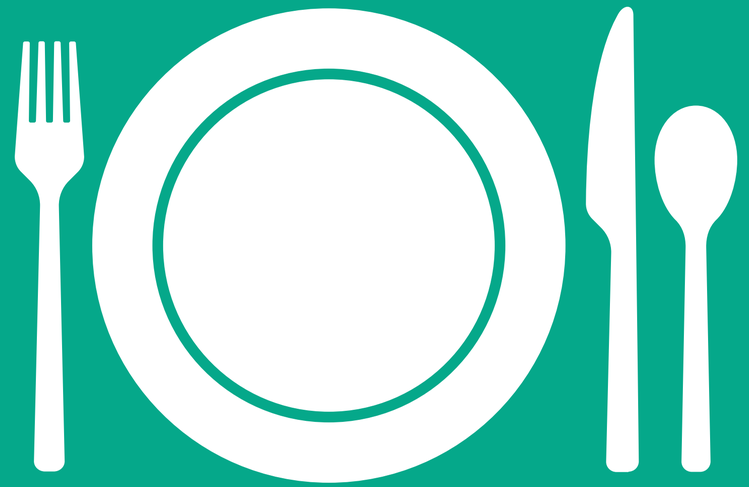
Exercise — Build Your First Workflow

Choose ONE track based on your role:

Track A — Document Heavy	Upload a real (non-sensitive) document from your work. Run the contract-review pattern: summary, obligations table, escalation flags, questions to ask.
Track B — Communication Heavy	Create a Project for one recurring client or stakeholder. Add context and instructions, then draft this week's real update inside it.
Track C — Data & Reporting	Upload a spreadsheet export. Ask for trends, outliers and a narrative summary. Then generate an artifact dashboard from the same data.
Track D — Process Builder	Take a task you repeat weekly. Write it as a reusable template prompt, test it twice, and refine it until the output needs no edits.

Start Small, Start Simple - Complexity comes with experience

Lunch



SESSION 3

14:00 – 15:30

Governance, Adoption & Real-World Application



BY THE END OF THIS SESSION YOU WILL BE ABLE TO:

1. Apply GDPR and data-privacy rules to everyday Claude use
2. Know exactly what never to upload — and the safe alternatives
3. Avoid the common mistakes that undermine trust in AI outputs
4. Leave with a personal 30-day adoption plan for your role

SESSION 3 · GOVERNANCE

Data Privacy & GDPR Considerations

What works in Claude's favour

- Paid plans (Pro / Team / Enterprise): conversations are not used to train models
- Encryption in transit and at rest; SOC 2 certified
- Admin controls, SSO and audit logs on Team / Enterprise
- Conversation history can be deleted; retention controls available
- Anthropic offers a Data Processing Agreement for GDPR purposes

SESSION 3 · GOVERNANCE

Data Privacy & GDPR Considerations

What remains YOUR responsibility

- GDPR still applies to what you put in: you are the controller of personal data you paste
- Free-tier settings differ — check whether your inputs may be used for training
- Lawful basis, minimisation and purpose limitation are your call, not the tool's
- Client confidentiality and NDA obligations are unchanged by using AI
- Your organisation needs an AI usage policy — sign-off from legal or DPO before rollout

SESSION 3 · GOVERNANCE

What Not to Upload — and What to Do Instead

Personal Data

Names + contact details, PPS / NI numbers, dates of birth, HR or medical records

Instead: anonymise — Client A, Employee 1 — or strip identifiers before pasting

Confidential Business

Unreleased financials, M&A material, board strategy, client data under NDA

Instead: use dummy figures with the same structure, or get explicit sign-off first

Credentials & Access

Passwords, API keys, tokens, internal URLs with embedded authentication

Instead: never. Use placeholders like [API_KEY] in any code or config you share

Legal Sensitivities

Live disputes, regulatory submissions, audit findings, whistleblowing material

Instead: route through legal counsel — privilege can be compromised by disclosure

SESSION 3 · GOVERNANCE

Building Safe & Effective Team Habits



Review before it leaves the building

Every client-facing or high-stakes output gets a human read. Claude drafts; a person owns. Make this a stated norm, not an unspoken hope.



Shared prompt library, not private magic

Keep the team's best prompts in a shared Project or doc. When someone finds a prompt that works, it becomes team property within the week.



Disclose where it matters

Agree when AI assistance should be flagged — for example in tender responses, published content or advice. Consistency beats improvisation.



Monthly 20-minute retro

What worked, what failed, what leaked time. AI practice compounds when the team compares notes; it stalls when everyone experiments alone.

SESSION 3 · GOVERNANCE

EU AI Act: Human-in-the-Loop (HITL)

01

Article 14 Mandate

High-risk systems must be designed for natural persons to oversee, understand limitations, and override outputs.

Required: Active, documented human oversight — not passive claims.

02

Practical HR Action

Establish and train a dedicated human review panel for all critical AI-assisted decisions like final shortlists and grading.

Mandate: Formal training for managers to interpret and act on AI data.

03

The 4-Step Operational HILT Protocol

1. **Input Verification:** Ensure strict data minimisation and remove PII from prompts.
2. **Generation Logging:** Automatically capture and audit exact prompts and raw outputs.
3. **Oversight & Review:** Human review checks for hallucinations, bias, and compliance.
4. **Final Sign-Off:** Manual signature certifying human verification before finalisation.

SESSION 3 · GOVERNANCE

Common Mistakes & How to Avoid Them

The Mistake	The Better Approach
One-line prompt, then blaming the tool for a generic answer	Brief it with C.R.A.F.T. — context, role, audience, format, constraints
Shipping the first output unread	Claude is a first-draft engine. Review, iterate, then own the result
Pasting sensitive personal or client data	Anonymise or use placeholders; check your org's AI policy
Trusting facts, figures and citations without checking	Verify anything that matters against an authoritative source
Starting a fresh chat for every task and re-explaining everything	Use Projects — brief once, reuse the context all quarter
Letting great prompts die in one person's chat history	Save them to the shared library; make wins reusable

SESSION 3 · GOVERNANCE

Source Verification & Citations

The Trust Gap

AI models are built to generate fluent, highly plausible language. However, fluency does not equal factual accuracy.

Without explicit forcing, models will hallucinate authoritative-looking facts, figures, and academic citations that simply do not exist in the real world.

CRITICAL RULE:

Never accept statistical claims, legal precedents, or biographical data from a generation without verifying against an authoritative external reference. Trust, but verify manually.

The Prompting Fix

Force the model to ground its claims. By demanding explicit links, you structurally reduce hallucinations and create an instant audit trail.

RECOMMENDED SYSTEM PHRASE

```
"Provide direct, clickable links to any
used sources to back up your claims."
```

Result: Model outputs shift from generic assumptions to auditable evidence.

SESSION 3 · THE WIDER PICTURE

Claude Code — A Brief Overview & Where It Fits

What it is

An agentic coding tool: Claude working directly inside a codebase from the command line or desktop app — reading files, writing code, running tests and completing multi-step engineering tasks end-to-end.

It is the same underlying Claude, pointed at software instead of documents.

For non-developers, the takeaway:

Small internal tools, data scripts and automations that used to need a dev backlog can now be requested in plain English — via your technical colleagues.

Business relevance

- Dev teams ship faster with fewer handoffs
- One-off automations become economically viable
- Prototypes in days, not quarters

Not for today's audience if...

- Your work is writing, analysis and documents — claude.ai is your tool
- You have no codebase or developer support
- You want a no-code automation platform (different category)

Case Examples — Claude in Action



Legal & Compliance

300 pages of regulatory guidance uploaded. Claude summarises obligations, flags action items and drafts policy updates — a 3-day task done before lunch.



Sales & BD

A Project holds the ICP, product sheets and objection handling. Every outreach email, comparison and proposal comes out consistent and on-tone.

SESSION 3 · REAL-WORLD APPLICATION

Case Examples — Claude in Action



Strategy & Consulting

12 industry reports synthesised into a market landscape brief with competitor positioning — an afternoon instead of two weeks.



HR & People Ops

Interview notes for 8 candidates structured into a consistent scoring format — 2 hours of admin saved and less bias in how notes get written up.

Case Examples — Claude in Action



Customer Success

Weekly ticket exports analysed for themes and at-risk accounts, with a drafted comms update — 4 hours of analysis in a 20-minute workflow.



Marketing & Content

A Project with brand guidelines and past campaigns drafts blogs, captions and ad copy in the house voice — first drafts in minutes.

SESSION 3 · REAL-WORLD APPLICATION

Your 30-Day Adoption Plan

WEEK 1

One task, daily

- Pick ONE recurring task
- Use Claude for it every day
- Save the prompt that works

WEEK 2

Build your base

- Create 2 Projects (client + reporting)
- Add your writing samples
- Start your prompt library

WEEK 3

Go deeper

- Add a document workflow
- Try one artifact tool
- Connect calendar or email (if approved)

WEEK 4

Make it stick

- Share 3 best prompts with the team
- Measure: hours saved this month
- Pick next month's workflow

The single biggest predictor of success: daily use of one task in week 1. Breadth comes later; habit comes first.

HANDS-ON · 20 MINUTES

Exercise 3 — Draft Your Own 30-Day Plan

1. List the 5 tasks that eat most of your week. Ask Claude to help you rank them by 'AI leverage': time saved vs risk if it goes wrong.
2. Pick your Week 1 daily task from the top of that list — high leverage, low risk.
3. Ask Claude to draft your personal 30-day plan using the framework from the last slide, tailored to your role.
4. Write the one governance rule you will personally follow — and the one you will propose to your team on Monday.

You leave today with a plan, not just notes.

Key Takeaways

1. Claude is a practical business tool — its edge is documents, writing quality and careful reasoning
2. Quality in, quality out: C.R.A.F.T. your prompts and iterate rather than settle
3. Sonnet by default; Haiku for volume; Opus when the stakes justify it; Fable for Power Projects
4. Projects, Artifacts, Connectors and Skills turn a chatbot into infrastructure
5. GDPR and confidentiality remain your responsibility — anonymise, verify, review
6. Adoption is a habit, not an event: one task, daily, for the next week

FROM 15:30

Q&A + Prompt Clinic

Follow up for The Clinic:

1. A real task that did not work well today ; we can fix it
2. A workflow from your role you want templated
3. Governance questions for your organisation's rollout
4. Anything from the day you want a deeper response on

Thank you.

Thank you

Questions??