



AI TRAINING WORKSHOP

Claude & Copilot Practical AI for your team

Working confidently and safely
with Claude and Microsoft Copilot

Delivered by Digital Greenhouse • Sydney



What we'll cover together

01

AI, the big picture

Overview, expectations and background

02

Prompting that works

A simple recipe for reliable results

03

Copilot in your day

Real use cases: documents, emails and summaries

04

Deeper work with Claude

Research, long documents and contract review

05

Claude & Copilot

A side-by-side — and how to use both

06

Safe & responsible use

Privacy, data and confidentiality considerations

PROMPTING

A simple recipe for better answers

1

Role

Tell it who to be

"You are a senior commercial analyst..."

2

Task

Say exactly what you want

"Draft a short letter of advice..."

3

Context

Give it the facts & files

"Based on the attached contract and these dates..."

4

Format

Describe the output

"Plain English, under 300 words, with headings."

Then keep talking. Treat it as a conversation — review the answer, point out what's off, and ask it to refine. The second and third drafts are where the value is.

Copilot across your working day

Word

Draft first versions of letters, agreements and memos, then summarise long documents in seconds.

Outlook

Catch up on long email threads and draft replies in your own tone without leaving your inbox.

Excel

Spot trends, build quick tables and turn raw data into a clear summary or chart.

Teams

Get meeting recaps, action items and answers to "what did I miss?" after every call.

Where Claude earns its keep

1

Research & summarising

Digest long judgments, reports and bundles, then ask follow-up questions in plain English.

2

Drafting & rewriting

Produce clean first drafts and rework clauses for tone, clarity or a client-friendly voice.

3

Contract review

Compare an agreement against your standard terms, flag risks and suggest redlines to consider.

4

A second set of eyes

Pressure-test an argument, surface missing points and explain complex material simply.

Two tools, one toolkit

Microsoft Copilot

Inside the apps you already use

- Lives in Word, Outlook, Excel, Teams & PowerPoint
- Grounded in your company's own files and email
- Stays inside your Microsoft 365 tenant
- Best for everyday drafting, summarising & inboxes

Claude

A thinking partner for deeper work

- A dedicated workspace for research & analysis
- Handles long documents and nuanced reasoning
- Strong at contract review, redlining & drafting
- Best when a task needs depth, not just speed

Which to adopt? For most companies, both — Copilot in the flow of work, and Claude when the thinking gets heavy.

Protecting client confidentiality

Know which tool you're in

Enterprise Claude and company Copilot keep data in your environment and don't train on your content. Free consumer chatbots do not — never paste confidential client information into those.

Sign in with your work account

Your access, permissions and sensitivity labels travel with you. Copilot only ever surfaces what you already have rights to see.

Mind privilege and access

AI will surface whatever a user can reach. Keep access tight so nothing crosses a confidentiality boundary by accident.

Treat prompts like documents

What you type can be logged. Label, restrict and think before sharing sensitive detail — the same care you'd give any file.

You stay in the driver's seat

1

Always review the output

AI drafts; you decide. Every output gets a human read before it leaves your desk.

2

Check every citation

AI can sound confident and still be wrong. Verify cases, figures and quotes against the source.

3

Keep judgement human

Use AI to clear the routine work so your time goes to the calls only a person can make.

4

Be open about its use

Follow the company's policy on when and how to tell clients AI helped with their work.



LET'S GET HANDS-ON

Start small, build the habit

- Pick one real task this week and try it with Claude and Copilot.
- Save the prompts that work — your own company-wide library starts here.
- Bring your questions to your 1:1 coaching and policy session.

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