

Generative AI for Business Productivity

Prompting, workplace tasks and responsible use

FA-0619 · 1 day

AI for Leaders & Business · Agentic & Generative AI

Practise prompts and review AI-assisted workplace outputs, compare available tools and plan a small responsible-use pilot.

Introduction

This one-day workshop is for business users, managers and analysts who want a practical introduction to generative AI at work. It covers task selection, prompting, document and data support, tool comparisons, connected assistants and responsible-use checks.

Participants practise a small selection of tasks, such as drafting a communication and analysing a prepared document or spreadsheet. Other use cases are demonstrations or discussion; the course does not promise productivity gains, teach every product feature or build enterprise integrations.

Examples may use ChatGPT, Claude, Gemini or Microsoft Copilot where access is available. Features, model choices, licences and data protections depend on the actual account, organisational settings and current product documentation.

Learning outcomes

The course teaches participants to:

- Select suitable everyday business tasks for AI assistance and identify tasks requiring human judgement.
- Write prompts with a clear task, context, output format, constraints and evaluation criteria.
- Review AI-assisted drafts, summaries and spreadsheet suggestions for accuracy and usefulness.
- Compare available tools against a defined task, privacy requirements, access and cost.

- Explain assistants, agents, retrieval-augmented generation and MCP connectivity at awareness level.
- Identify confidentiality, bias, copyright and approval considerations.
- Outline a small pilot with a baseline, review process and realistic evaluation measures.

Prerequisites

- Basic computer and internet skills
- Familiarity with office productivity tools
- No programming knowledge required

Access to at least one approved AI assistant is recommended. The course does not require buying a particular plan or accessing every named tool.

Use prepared public, anonymised or synthetic information. Check account data-handling policies and permissions before uploading any workplace material.

Training outline

1. 1. Generative AI in Everyday Work

What generative AI can realistically do today

Illustrative workplace use cases rather than unsupported claims about universal adoption.

LLMs, multimodal AI, AI assistants, and AI agents

Productivity versus automation versus augmentation

Common misconceptions and practical limitations

2. 2. Tool Selection and Workplace Features

ChatGPT and ChatGPT Enterprise

- Capabilities and limitations of the models available in the actual training account; avoid fixed release-number prerequisites.
- Deep research

- Data analysis
- File uploads
- Projects and selected agent workflows, subject to the assigned seat and workspace controls.
- Review applicable enterprise privacy and administration settings; do not assume personal and organisational accounts have the same protections.

Anthropic Claude

- Available Claude models and task suitability; model releases and limits vary.
- Claude for professional work
- Claude for long-context analysis
- Claude for writing, summarisation, reasoning, and coding support
- Claude Tag and Slack collaboration examples where an organisation has enabled and configured access.
- Claude Enterprise and Team use cases

Google Gemini

- Workspace productivity use cases
- Research and summarisation workflows
- Multimodal interaction

Microsoft Copilot

- Microsoft 365 productivity workflows
- Word, Excel, PowerPoint, Outlook, and Teams scenarios
- Business user adoption considerations

Choosing the Right AI Tool

- ChatGPT versus Claude
- Claude versus Gemini
- Copilot versus standalone AI assistants
- Tool selection by business task
- Compare cost, permissions, privacy, output quality and usability using a defined task.

Claude Workflow Examples

Evaluating Claude for a Business Task

- Long-form writing
- Large document review
- Policy-style drafting support; specialist legal review is still required where appropriate.
- Evaluate reasoning-related outputs against task evidence rather than relying on confident language.
- Summarisation with comparison to the original source.
- Natural business communication

Task-Based Comparison with ChatGPT

- Compare writing style on the same prompt and audience.
- Compare supported conclusions and errors, not an assumed universal reasoning ranking.
- File and document workflows
- Enterprise collaboration scenarios
- Practical selection guidelines

Claude and modern workplace collaboration

- Claude/Claude Tag in Slack: optional demonstration of configured access, channel context and organisational permissions.
- Team-based AI interaction
- Context-aware assistance and the risks of unintended information exposure.
- Task tracking and summarisation
- Review owner-configured access controls and activity visibility.

3. 3. Business Prompting

Prompting fundamentals

- Role
- Task
- Context
- Format
- Constraints

- Examples
- Evaluation criteria

Prompting for better outputs

- Clear instruction design
- Structured response formats
- Iterative refinement
- Tone and audience control
- Asking for assumptions and limitations
- Reducing vague and generic responses

Business prompt patterns

- Executive summaries
- Email drafting
- Proposal support
- Meeting preparation
- Report writing
- Policy drafting
- Customer response drafting
- Brainstorming and ideation
- Decision comparison
- Risk identification

4. 4. Selected Productivity Exercises

Writing and communication

- Professional emails
- Reports and memos
- Presentations
- Meeting notes
- Minutes of meeting
- Executive updates
- Customer-facing communication

Research and analysis

- Topic exploration
- Market scanning
- Competitor review
- Document summarisation
- Long-document analysis
- Source checking
- Insight extraction

Data and spreadsheet support

- Data cleaning concepts
- Formula assistance
- Trend interpretation
- Chart explanation
- KPI analysis
- Management reporting

Creative and strategic work

- Campaign ideas
- Product positioning
- Training content
- Internal communication
- Scenario planning
- Problem framing

Complete two small guided tasks; use demonstrations or discussion for the remaining examples. Check facts, calculations and suitability before using an output.

5. 5. Agents and Connected Knowledge

Understanding AI agents

- Assistant versus agent
- Task delegation
- Tool use

- Multi-step workflows
- Human approval points

Practical agent use cases

- Research agent
- Report preparation agent
- Meeting follow-up agent
- Customer support assistant
- Data analysis assistant
- Internal knowledge assistant

Model Context Protocol and connected AI

- MCP as a protocol for connecting AI applications with tools and context; it is not itself an autonomous agent or an access-control guarantee.
- Why tool connectivity matters
- AI access to business systems
- Permission boundaries, authentication and review of connected-data access.
- Enterprise integration considerations

Retrieval-augmented generation (RAG): retrieving relevant information to support an answer, with source, access and quality checks; retrieval does not guarantee correctness.

6. 6. Responsible Use and Review

Accuracy and verification

- Hallucinations
- Fact-checking
- Source validation
- Human review
- Check supporting evidence and uncertainty; a model's stated confidence is not a verified probability.

Privacy and confidentiality

- Sensitive data handling
- Customer data

- Internal documents
- Enterprise policy alignment
- Data leakage risks

Governance and compliance

- Acceptable use policies
- Approval workflows
- Auditability
- Bias and fairness
- Copyright awareness
- Risk management

7. 7. A Small Adoption Pilot

- Identify a suitable use case and a manageable first experiment.
- Create reusable prompt examples and simple team guidelines.
- Define a baseline, review quality and record actual time/effort rather than assuming a productivity gain.
- Assign approval and escalation responsibilities.
- Decide whether to continue, revise or stop the pilot after evaluating evidence.