

Claude AI for Business Teams

A practical, hands-on 1-day workshop - delivered on-site, anywhere in the UK. Course curriculum and schedule.

Duration	1 day - 5 hours contact time (09:30-15:30)
Delivery	On-site at your premises, anywhere in the UK
Group size	6-20 participants (minimum group size 6)
Requirements	A laptop each. No technical background needed.
Preparation	A 5-minute survey so examples match your industry and workflows

Why This Course Is Different

Most "AI training" is a slideshow about what large language models are, followed by a generic demo nobody remembers. This is not that. It is a hands-on, task-based workshop built the same way our Excel training programmes are built: every session ends with participants having actually done the thing on their own laptop, using their own real work - their own emails, reports, spreadsheets and meeting notes.

Who This Is For

Non-technical business teams - operations, admin, HR, finance, marketing, customer service and management. No coding, no APIs, no jargon. If someone can use email and Excel, they can complete every exercise in the room.

What Every Participant Leaves With

- A personal "Prompt Playbook" of 15-20 ready-to-use prompts for their exact role
- A working Claude Project set up as their own team assistant
- A clear "traffic light" understanding of what to trust, what to check, and what never to paste into an AI tool
- A follow-up resource pack: cheat sheets, prompt templates and a quick-reference guide
- Habits that save real hours per week - not just a certificate

Course Schedule (5 Hours Contact Time)

Time	Session
09:30 - 09:40	Welcome, laptop check, goals for the day
09:40 - 10:10	Module 1 - How Claude Actually Works (Without the Jargon)
10:10 - 10:50	Module 2 - The Prompting Framework
10:50 - 11:00	Break
11:00 - 11:40	Module 3 - Claude for Everyday Work: Email, Documents & Meeting Notes
11:40 - 12:20	Module 4 - Claude Inside Excel: Your Bridge From Formulas to AI

Time	Session
12:20 - 13:00	Lunch
13:00 - 13:30	Module 5 - Build Your Team Assistant (Projects & Custom Instructions)
13:30 - 14:00	Module 6 - Claude for Analysis & Decisions
14:00 - 14:10	Break
14:10 - 14:40	Module 7 - Working Smarter: Speed, Cost & Efficient Prompting
14:40 - 15:00	Module 8 - Using AI Safely: Data, Privacy & Company Policy
15:00 - 15:20	Module 9 - Build Your Personal Prompt Playbook
15:20 - 15:30	Wrap-up, Q&A, certificates

Module Breakdown

Module 1 - How Claude Actually Works (Without the Jargon)

Goal: build the right mental model in 30 minutes, so nothing later feels like "magic" or "risk."

- What Claude is (and isn't) - a writing/thinking assistant, not a search engine or a database of your company
- Why Claude sometimes gets things wrong ("hallucinations") and how to spot it
- The one habit that prevents 90% of AI mistakes: always ask "would I trust this from a junior colleague without checking?"
- Live demo: a good answer vs. a confidently wrong answer, side by side
- Hands-on: everyone logs in, sends their first message, and tests Claude on something from their own job

Module 2 - The Prompting Framework: Getting Useful Answers, Every Time

Goal: replace "trial and error" with a repeatable structure anyone can follow.

- The 4-part prompt structure: Task, Context, Format, Constraints
- Before/after: a vague prompt vs. a well-built one, using a real example from your industry
- Giving Claude examples of what "good" looks like, so it matches your tone, not a generic AI tone
- Follow-up prompting - treating it like a conversation, not a search box
- Hands-on: each participant rewrites 3 of their own weak prompts using the framework and compares results

Module 3 - Claude for Everyday Work: Email, Documents & Meeting Notes

Goal: the tasks every single employee does every single day, made faster.

- Drafting and rewriting emails in your company's tone
- Summarising a long email thread or document into 3 bullet points
- Turning rough meeting notes into a clear action list with owners and deadlines
- Proofreading and tightening writing without losing your voice
- Hands-on: participants bring a real email/document/notes file and process it live in the room

Module 4 - Claude Inside Excel: Your Bridge From Formulas to AI

Goal: for teams already using Excel daily, this is the highest-value module in the room.

- Using Claude to explain what a formula does in plain English
- Cleaning messy data (inconsistent dates, duplicate entries, blank cells) using natural-language instructions
- Asking Claude to build a formula or a summary table from a plain description of what you need
- Spotting errors in a spreadsheet by asking Claude to review it
- Hands-on: participants bring a real (anonymised) spreadsheet and clean/analyse it with Claude, live

Module 5 - Build Your Team Assistant (Projects & Custom Instructions)

Goal: move from "one-off questions" to a reusable assistant set up for your team's actual work.

- What a "Project" is and why it remembers your context so you don't repeat yourself
- Setting custom instructions once, so every future answer matches your company's tone and format
- Building one shared Project template your whole team can copy (e.g. "Customer Reply Assistant")
- Hands-on: each participant builds one working Project tailored to their own role

Module 6 - Claude for Analysis & Decisions: Reports, Comparisons, Summaries

Goal: using Claude as a thinking partner for decisions, not just a writing tool.

- Summarising a long report or policy document into an executive brief
- Comparing two documents (e.g. two supplier quotes) and getting a clear pros/cons table
- Asking Claude to challenge a plan and find gaps or risks before you present it
- Where to stop trusting Claude and bring in a human expert (legal, financial, HR judgement calls)
- Hands-on: participants run a real comparison or summary task from their own workload

Module 7 - Working Smarter: Speed, Cost & Efficient Prompting

Goal: this is the module that pays for the course. Most teams waste time and budget through inefficient use.

- Why vague, back-and-forth prompting costs more time and more usage than a well-built prompt
- Reusing prompts instead of rewriting from scratch every time (the Playbook habit)
- Batching similar tasks together instead of one-at-a-time
- Choosing the right tool for the task, so Claude is used where it saves time - and skipped where it doesn't
- Hands-on: a "before and after" time trial - the same task done the slow way and the smart way, timed

Module 8 - Using AI Safely: Data, Privacy & Company Policy

Goal: confidence, not fear - a clear, simple rule set your team will actually remember.

- The "traffic light" rule: what's safe to paste into Claude, what needs anonymising, what should never go in
- Customer data, personal data and confidential business information - practical do's and don'ts
- How chat history and data retention work, explained simply
- A short, customisable "AI Usage Guidelines" handout your company can adopt immediately
- Hands-on: group exercise - sorting 10 real example tasks into "safe," "anonymise first," and "don't"

Module 9 - Build Your Personal Prompt Playbook

Goal: make sure Monday morning isn't the day everyone forgets the training happened.

- Each participant compiles their best 15-20 prompts from the day into one saved, reusable document
- Everyone leaves with a personalised, role-specific reference - not a generic handout
- Team leads get a combined "team playbook" merging everyone's best prompts

Booking

Delivered on-site at your premises, anywhere in the UK. Minimum group size 6. Get in touch to book a date or arrange a short pre-course call so the day's examples are tailored to your team: +44 744 0030 334 - iamdeepaksharma.com