



COURSE OUTLINE

training | consulting | courseware

Claude AI for Productivity

Course Aim

This course is designed for professionals who want to use Claude AI to work more efficiently. Participants will learn how to write effective prompts, draft professional communications, work with Claude inside Microsoft 365 applications, and integrate Claude into their day-to-day workflows

What you'll learn:

- Understand what Claude is, how it differs from other AI tools, and where it fits in a business environment.
- Write clear, effective prompts that produce useful, professional output first time.
- Use Claude to draft, refine and respond to emails and other business communications.
- Work with Claude directly inside Word, Excel, PowerPoint and Outlook using the Microsoft 365 add-ins.
- Upload and interrogate documents, spreadsheets and other files within Claude.
- Explore Claude-specific tools including Projects, Artifacts, Skills, Design and Cowork.
- Build reusable prompt templates and workflows tailored to your role.
- Automate tasks with AI Agents.

Course Duration:

Full Day: 9 am to 4:30 pm

Inclusions:

Each participant will receive a comprehensive course manual covering the AI training content.

What to Bring:

- Laptop.
- Claude Pro or better License.

Course Topics:

Introduction to Claude

- General Overview
- Claude vs other AI tools.
- Accessing Claude.
- Understanding context and conversation memory.
- Installing and accessing the Claude add-in.

Getting Started

- Navigating the Claude interface
- Starting and managing conversations
- Uploading files and documents
- Using Projects to organise work
- Switching between Claude models

Prompting and Context Engineering

- Writing clear, effective prompts.
- Giving Claude context and role instructions.
- Follow-up and refinement techniques.
- Using examples to shape output.
- Avoiding common prompting mistakes.

Ethics and Limitations

- Accuracy and AI hallucinations.
- Bias and inclusion.
- Political and cultural influences.
- Human accountability for AI-assisted decisions.
- Security and Privacy.

Claude and Outlook

- Drafting replies to client and stakeholder emails.
- Managing tone: formal vs informal.
- Summarising long email threads.
- Internal communications and memos.
- Coaching Claude on your voice and style.

Claude in Microsoft Excel

- Writing and explaining formulas and functions.
- Analysing and summarising data.
- Adding calculated columns.
- Cleaning and restructuring data.
- Generating insights and commentary.

Claude in Microsoft Word

- Writing and improving existing content within Word.
- Summarising long documents
- Making edits with tracked changes

Claude in Microsoft PowerPoint

- Installing and accessing the Claude add-in.
- Generating slides from a brief or outline.
- Editing and improving existing slides.
- Working within your slide master and template.
- Writing and refining speaker notes.

Claude-Specific Features

- **Projects:** persistent context and files.
- **Artifacts:** standalone editable outputs.
- **Skills:** reusable workflows and procedures.
- **Code:** scripting and automation overview.
- **Design:** prototypes, mockups and slides.
- **Cowork:** agentic file and task automation.

Agentic AI

- Using Cowork
- Using agents.
- Create custom agents and automate workflows.