



CLAUDE AI

GETTING STARTED



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CLAUDE AI: GETTING STARTED

Claude is an AI assistant from Anthropic that can help you write, brainstorm, summarize, analyze, organize information, and think through everyday work tasks. This handout will help you get started with Claude in practical ways you can use during and after class.

By the end of the session, you should feel more comfortable asking Claude better questions, reviewing its responses, and choosing a few practical ways to use it in your own work.



What Is Claude?

Claude is a conversational AI assistant. You type a request, question, draft, file content, or idea, and Claude responds with text, analysis, suggestions, summaries, or other helpful output. It can assist with many kinds of knowledge work, but it does not replace your judgment, expertise, or responsibility for the final result.

What Claude Is Not

Claude is powerful, but it is important to understand its limits. It should be treated as an assistant that helps you think, draft, organize, and revise—not as an automatic source of truth or a replacement for professional judgment.

- **Claude is not a guaranteed fact source.** It can make mistakes, leave out context, or sound confident when an answer needs verification.
- **Claude is not automatically connected to your work files.** Unless you provide content or use approved integrations, it will not know what is in your email, Teams chats, SharePoint files, or internal systems.
- **Claude is not a substitute for approved systems of record.** Use official business systems for final data, decisions, records, approvals, and compliance documentation.
- **Claude is not a place to paste sensitive information without approval.** Do not enter confidential, regulated, client-sensitive, employee-sensitive, or private information unless your organization allows it.
- **Claude is not your final editor or decision maker.** You are responsible for reviewing tone, accuracy, completeness, and appropriateness before using the output.
- **Claude is not the same as Copilot.** Copilot is designed to work inside Microsoft 365 with permitted work content, while Claude is often used as a focused writing, reasoning, analysis, and brainstorming partner.



Bottom line: Use Claude to accelerate thinking and drafting, but rely on people, policies, approved systems, and verified sources for final decisions.

What Is Anthropic?

Anthropic is the artificial intelligence company that created Claude. The company focuses on building AI systems that are designed to be helpful, reliable, and safer to use. In practical terms, Anthropic is the organization behind Claude, while Claude is the AI assistant you interact with.

Why Use Claude?

Claude can be useful because it helps you move faster through everyday knowledge work while still keeping you in control of the final result. Instead of starting from a blank page, you can use Claude to generate a first draft, organize messy information, explain complex ideas, or help you think through options.

For many people, the biggest benefit is not that Claude gives a perfect answer on the first try. The benefit is that it gives you a starting point, a second perspective, or a structured way to work through something more clearly.

Practical Reasons to Use Claude

- **Save time on first drafts.** Ask Claude to draft emails, outlines, summaries, agendas, checklists, or training content that you can review and edit.
- **Clarify your thinking.** Use Claude to organize ideas, compare options, ask clarifying questions, or turn rough notes into a clearer plan.
- **Improve communication.** Ask Claude to adjust tone, simplify wording, shorten long messages, or rewrite content for a specific audience.
- **Work through complex information.** Use Claude to summarize long text, identify key points, create tables, or explain unfamiliar topics in plain language.
- **Generate ideas quickly.** Brainstorm titles, examples, activities, questions, solutions, or next steps when you need a fresh starting point.

Common uses include drafting emails and outlines, summarizing long documents or notes, brainstorming ideas, rewriting content for different audiences, creating checklists or tables, and helping you think through a problem by asking clarifying questions or organizing options.

Remember: Claude is most helpful when you treat it as a capable assistant, not an automatic final answer. You still need to review, verify, and adjust the output so it fits your purpose, audience, and standards.



How Is Claude Different from Copilot and ChatGPT?

You may use more than one AI tool at work. This section helps you decide which tool to open first based on the task, the information you need, and where that information is stored.

Tool	Created By	Best Known For	Common Workplace Uses
Claude	Anthropic	Thoughtful writing, long-form analysis, summarization, coding help, and working through complex information conversationally.	Drafting and refining content, summarizing documents, brainstorming ideas, reviewing text, creating structured plans, and analyzing pasted information.
Microsoft Copilot	Microsoft	Working inside Microsoft 365 apps and using work context, such as files, meetings, chats, and emails that the user has permission to access.	Summarizing Teams meetings, drafting in Word, analyzing Excel content, creating PowerPoint drafts, managing Outlook messages, and finding work information.
ChatGPT	OpenAI	Flexible general-purpose conversation, writing, brainstorming, coding, image-related tasks, learning support, and broad everyday use.	Generating ideas, explaining concepts, drafting text, solving problems, coding assistance, creating images, and exploring personal or professional questions.

Simple way to remember it: Use Claude when you want help thinking, writing, critiquing, or analyzing information you provide. Use Copilot when you want AI to work with content inside Microsoft 365. Use ChatGPT when you need a flexible general-purpose assistant for a wide range of personal, creative, technical, or business tasks.



Claude vs. Copilot: Quick Decision Table

Use this table when you are deciding which AI tool to open first. Ask yourself two questions: **Where does the information live?** and **What kind of help do I need?** If the information is in Microsoft 365, Copilot is usually the better starting point. If you are pasting content into the chat, brainstorming, critiquing, writing from scratch, or reasoning through options, Claude may be the better starting point.

Use Claude when...	Use Copilot when...
You want to analyze long pasted text, an external report, or content you provide directly.	You need AI to work with your Outlook, Teams, Word, Excel, PowerPoint, SharePoint, or OneDrive content.
You want a thoughtful critique of writing, messaging, tone, structure, or assumptions.	You want help summarizing meetings, finding work files, drafting in Microsoft apps, or using your permitted work context.
You want to brainstorm creative scenarios, training activities, role-plays, or strategy options.	You want AI assistance inside the workflow where the work already lives.
You want to reason through a problem, compare trade-offs, or build a recommendation from information you provide.	You need grounded answers based on Microsoft 365 content you have permission to access.

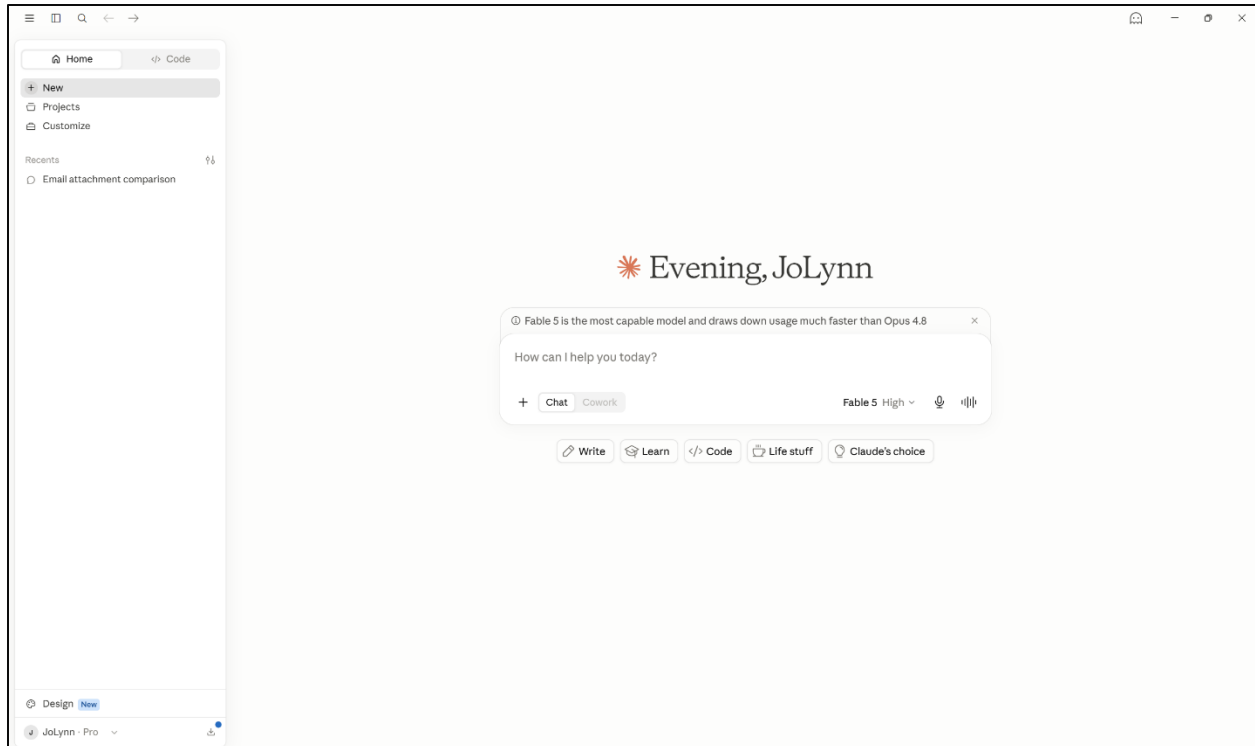
Understanding the Claude User Interface

Claude's interface is designed around a simple chat experience. You type a request into the message box, Claude responds in the conversation area, and you can continue refining the result with follow-up instructions. Depending on your plan, device, and organization settings, you may also see options for projects, file uploads, model selection, artifacts, and other capabilities.

Interface Area	What It Does	How Students Can Use It
Conversation Area	Shows your chat with Claude, including your prompts and Claude's responses.	Review the conversation, ask follow-up questions, request changes, or build on a previous response.
Prompt Box	The message area where you type your question, task, or instruction.	Enter clear prompts, paste text to summarize or rewrite, and provide context for the task.
Plus Button or Slash Commands	Provides access to additional options, such as attaching files or choosing available tools and commands.	Use it when you want Claude to work with a document, image, text file, or other supported content.
Submit Button	Sends your prompt to Claude.	Click it after reviewing your prompt for clarity, context, and any needed instructions.



Interface Area	What It Does	How Students Can Use It
Model Selector	Shows which Claude model you are using and may allow you to switch models or response settings, if available in your account.	If this option is available, use the model or settings that best match the task, such as everyday drafting, deeper reasoning, or more complex analysis.
Left Sidebar	Often contains recent chats, navigation options, projects, artifacts, settings, and account controls.	Return to earlier conversations, start a new chat, organize work into projects, or adjust account settings.
Projects	If available, Projects organize related chats and optional project knowledge in one workspace.	If you have this option, create a project for an ongoing topic, client, class, or workflow so related material stays together.
Artifacts	If available, artifacts display larger stand-alone content, such as documents, code, diagrams, or interactive tools, in a separate panel when Claude creates them.	If you see artifacts, use them when Claude generates something you may want to revise, reuse, share, or continue building.



Starter Categories Under the Chat Box

Below the chat box, Claude may show quick-start categories or suggestion chips such as **Write**, **Learn**, **Code**, **Analyze**, or **Create**. These are designed to help you get started when you are not sure what to ask.

Think of these categories as shortcuts, not requirements. You can click one to get prompt ideas, or you can ignore them and type your own request directly. The categories may change depending on your plan, device, and Claude's interface updates.



Tip: The exact buttons and options you see may vary based on whether you are using Claude on the web, desktop app, or mobile app, and whether you are using a Free, Pro, Team, or Enterprise plan. If something shown in class is missing from your screen, check your plan, settings, or organization permissions.



Reference: Claude Plans, Models, and Settings

Claude screens and features may vary depending on your plan, device, and organization settings. You may see different options for file uploads, projects, models, artifacts, privacy controls, or usage limits.

For this beginner session: You do not need to memorize plan names or compare every feature. Focus on the skills that work across plans: clear prompts, thoughtful follow-up questions, careful review, and responsible use.

Models: A model is the version of Claude responding to your request. Some models may be faster for everyday work, while others may be better for complex reasoning, writing, coding, or analysis. If you are new, start with the default or recommended model unless you have a specific reason to switch.

Settings: When you are just getting started, check that you are using the right account, review privacy or data controls, and notice which features are available. If you use Claude for work, follow your organization's policy before entering or uploading information.

Your First Claude Workflow

1. Start a new chat or open a project related to your work.
2. Type your prompt in the prompt box and include the task, context, audience, format, and constraints.
3. Attach or paste any content Claude needs to work with, if appropriate and allowed.
4. Review Claude's response carefully.
5. Ask follow-up questions or give revision instructions, such as "make this shorter," "put this in a table," or "explain this for beginners."
6. Verify important information before using the final output.

Writing Better Prompts

A prompt is the instruction or question you give Claude. Better prompts usually produce better results. Think of Claude as a very capable assistant who still needs clear direction, context, and boundaries.



A Simple Prompt Formula

Task + Context + Audience + Format + Constraints

Prompt Part	What to Include	Example
Task	What do you want Claude to do?	Summarize, rewrite, compare, create, analyze, brainstorm.
Context	What background information matters?	This is for a one-hour beginner webinar.
Audience	Who is the output for?	Employees who are new to AI tools.
Format	How should the answer be organized?	Use a table, bullet list, checklist, email draft, or step-by-step guide.
Constraints	What limits should Claude follow?	Keep it under 200 words, avoid jargon, include three examples.

Before and After Prompt Example

Less Effective Prompt	More Effective Prompt
Write a summary of this document.	Summarize the document below for a busy manager. Focus on the main decision points, risks, and next steps. Use five bullet points and keep the language plain and professional.
Make this email better.	Rewrite this email so it sounds friendly, professional, and concise. Keep the main message the same, reduce the length by about one-third, and include a clear call to action at the end.
Give me ideas for training.	Brainstorm ten practical training activities for a one-hour beginner webinar on Claude. The audience is business professionals with little AI experience. Include activities that can be done live online.

Hands-On Exercise: Improve a Weak Prompt

Goal: Practice turning a vague prompt into a useful business prompt and then refining Claude's response.

1. Start with this weak prompt: **Write an email about a delay.**
2. Ask Claude to respond to the weak prompt and notice what is missing.
3. Rewrite the prompt using task, context, audience, format, and constraints.
4. Try this improved version: **Write a professional email to a client explaining that the project timeline is delayed by one week because we are waiting on final approval.**



Keep the tone calm, accountable, and solution-focused. Include a short apology, the new expected date, and the next step.

5. Compare the two results. What changed when you added context and constraints?
6. Ask Claude for one more revision, such as making the email shorter, warmer, more executive-level, or easier to scan.

Prompt Repair: What to Do When Claude's Answer Is Not Good Enough

If Claude's first response is too vague, too long, off target, or not formatted the way you wanted, do not start over right away. Give Claude repair instructions. Follow-up prompts often produce the best results.

If the response is...	Try this repair prompt
Too vague	That is too general. Make it specific to a small business team and include three concrete examples.
Too long	Shorten this by half while keeping the most important points.
Not organized well	Put this into a table with columns for issue, impact, and next step.
Missing context	Before revising, ask me up to five questions that would help you improve the answer.
Possibly inaccurate	Identify which parts are facts, which are assumptions, and what I should verify before using this.

Research and Summarization

Claude can help you work through information faster by summarizing, organizing, comparing, and explaining content. This is especially useful when you are reviewing long documents, notes, policies, articles, or pasted research.

Useful summarization prompts include: "Summarize this for someone who has only two minutes," "Pull out the main points, decisions, risks, and action items," "Create a comparison table of the options discussed," and "Identify anything that is unclear, missing, or needs follow-up."

Tip: When using Claude for research or summarization, always verify important facts, dates, statistics, names, and recommendations before relying on them.



Business Scenarios to Try During or After Class

Use these examples to connect Claude to real work. In a one-hour beginner webinar, choose one or two scenarios for live discussion or demo and leave the rest for after-class practice.

Class note: You do not need to complete every scenario during this one-hour session. Use these as reference examples to try after class, and focus on one or two that match your work.

Scenario 1: Analyze a Long External Report or Research Packet

Example: A leadership team receives a long industry report, grant guideline, vendor proposal, policy draft, or research packet that is not stored in Microsoft 365. They need to understand the key themes, risks, questions, and possible decisions.

Business benefit: Claude is strong at working through long pasted text and organizing it into plain-language summaries, decision points, risks, assumptions, and follow-up questions. This helps the team understand complex material before deciding what to do next.

1. Paste or upload the report content that Claude is allowed to review.
2. Ask Claude to summarize the material for a specific audience, such as executives, managers, or front-line employees.
3. Request sections for key takeaways, risks, opportunities, decisions needed, and unanswered questions.
4. Ask Claude to explain any complex or technical sections in plain language.
5. Verify important facts and use the summary as a discussion guide, not as the official source.

Scenario 3: Create Original Training, Coaching, or Facilitation Material

Example: A trainer, consultant, or manager needs to design a workshop activity, coaching conversation, discussion guide, role-play, or scenario-based exercise from scratch.

Business benefit: Claude is especially helpful for creative instructional design because it can generate realistic scenarios, adapt content for different audience levels, create facilitator scripts, and revise examples until they feel practical and natural.

1. Tell Claude the training topic, audience, time available, delivery format, and desired outcome.
2. Ask for several activity ideas with instructions, timing, discussion questions, and debrief points.
3. Ask Claude to make the scenarios realistic for your industry or audience.
4. Request facilitator talking points, participant instructions, and optional variations.



5. Review the final activity for accuracy, tone, accessibility, and fit before using it in class.

Scenario 4: Critique and Improve Sensitive or High-Impact Writing

Example: A leader is preparing an announcement, policy explanation, client proposal, difficult message, executive summary, or public-facing statement and wants it to be clear, balanced, and well-reasoned.

Business benefit: Claude is strong at thoughtful writing review. It can look for unclear wording, tone problems, missing context, unintended implications, weak structure, or places where the message may not land well with the audience.

1. Paste the draft message and describe the audience, purpose, and desired tone.
2. Ask Claude to review the draft for clarity, tone, structure, missing information, and possible misinterpretations.
3. Ask Claude to identify what is working well and what should be improved before rewriting.
4. Request one revised version and one shorter version for comparison.
5. Edit the final version so it matches your voice, facts, approvals, and organizational requirements.

Preview for a Future Advanced Claude Training

A future advanced session can go deeper into features such as Projects, Claude Design, artifacts, longer document workflows, model comparison, and repeatable business processes. For today, simply know that these features may exist in your account and may be useful once you are comfortable with the basics.

Explore After Class: Prompting Skills to Try Next

After the webinar, continue practicing with follow-up prompts. The most useful next skills are asking Claude to revise, shorten, organize, critique, or ask clarifying questions before answering.

- Ask Claude to make an answer shorter, clearer, warmer, or more executive-level.
- Ask Claude to organize information into a table, checklist, agenda, or action plan.
- Ask Claude to critique a draft before rewriting it.
- Ask Claude to identify assumptions, missing details, risks, or questions to verify.
- Ask Claude to ask you clarifying questions before creating a final answer.



Safe and Responsible Use

AI tools can be very helpful, but they can also make mistakes, sound confident when they are wrong, or miss important context. Use Claude as an assistant, not as the final authority.

- **Protect sensitive information.** Do not paste confidential, private, regulated, or client-sensitive information unless your organization allows it and the tool is approved for that data.
- **Verify important facts.** Check names, dates, calculations, legal or financial details, and anything that could affect a decision.
- **Watch for bias.** Review outputs for assumptions, stereotypes, or missing perspectives.
- **Use human judgment.** You are responsible for reviewing, editing, and approving the final work product.
- **Be transparent when needed.** Follow your organization's guidance for disclosing AI assistance.

Before You Use Claude's Output

- Did I verify names, dates, numbers, facts, and recommendations?
- Did I remove or protect sensitive, confidential, client, employee, or regulated information?
- Does the output match my audience, purpose, and tone?
- Did I check whether my organization allows this use of AI?
- Did I edit the final version so it sounds like me or my organization?
- Is this appropriate to send, share, publish, or rely on?

Live Demo Notes

Use this space to capture examples, prompts, and ideas from the live demonstration.

Demo Example	Prompt or Technique Used	How I Could Use This
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Best First Prompts to Try

- Explain this in plain language.
- Summarize this into five bullet points.
- Ask me questions before answering.
- Rewrite this for a professional audience.
- Put this into a checklist.
- Review this and tell me what could be clearer.



Quick Reference: Better Prompt Checklist

- Did I clearly state the task?
- Did I provide enough context?
- Did I identify the audience?
- Did I specify the format I want?
- Did I include any limits, tone preferences, or examples?
- Did I ask Claude to clarify anything before answering if the request is complex?
- Did I review the output carefully before using it?

Practice Prompts

Try one or more of these prompts after class:

1. Summarize these notes into a professional email recap with action items.
2. Rewrite this paragraph for a beginner audience and explain any technical terms.
3. Create a checklist I can use before sending this report to leadership.
4. Compare these two options in a table and recommend which one is better for a small team.
5. Ask me clarifying questions before creating a project plan for this idea.
6. Review this draft and suggest three ways to make it clearer and more concise.

Key Takeaways

- **Use Claude for the right work.** Claude is especially useful for long-form writing, thoughtful critique, brainstorming, summarizing pasted content, reasoning through options, and creating structured first drafts.
- **Choose Claude or Copilot based on where the information lives.** Use Copilot when the task depends on Microsoft 365 work content; use Claude when you are providing the content directly or want a focused thinking and writing partner.
- **Prompt quality matters.** Strong prompts include the task, context, audience, format, and constraints.
- **Follow-up prompts are normal.** If the first answer is not right, repair it by asking Claude to shorten, clarify, reorganize, ask questions, or identify assumptions.
- **Settings, plans, and features may vary.** Your screen may look different depending on your plan, device, and organization settings.
- **You are responsible for the final result.** Always review, verify, edit, and follow your organization's policies before using Claude's output.



Next Steps

1. Pick one routine task you do often, such as writing an email, summarizing notes, or creating a checklist.
2. Use the prompt formula from this handout to write a detailed prompt.
3. Ask Claude for a first draft, then refine it with follow-up instructions.
4. Verify the output and edit it so it matches your voice, purpose, and organization's standards.
5. Save your best prompts so you can reuse and improve them over time.