



PRACTICAL AI LEARNING GUIDE

Get Better at AI

A practical guide to getting more from Copilot,
ChatGPT and Claude

Six practical steps to help you use AI more effectively at work.



ASK



CONVERSE



REUSE



CONTEXT



CONNECT



DELEGATE

FIND YOUR NEXT USEFUL STEP

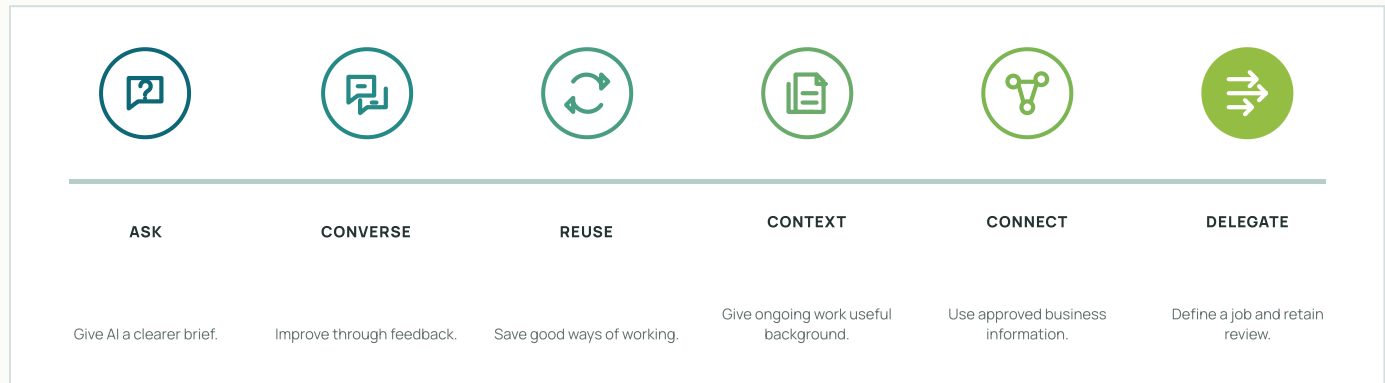
How mature is the way you use AI?

You may be at different levels for different types of work. This is not a test. It is a practical way to see what to try next.

START HERE

Start with the habit that would make a real piece of work easier tomorrow.

Small improvements compound when you save what works.



Where are you today?

Use these prompts to spot the next useful move, not to award yourself a score.

- I usually accept the first answer.
- I refine responses with follow-ups.
- I have prompts I use again.
- AI knows the project background.
- I can use approved information.
- I have delegated a repeatable task.

“AI can be a capable colleague. Work with it that way.

Explain the goal. Give it helpful background. Correct misunderstandings. Agree repeatable ways of working. Then verify what matters.

THREE COMMON PLACES TO START

Pick a familiar task, then move it one stage forward.

CLIENT MEETING

Ask for a meeting plan → refine the questions → save the process.

MONTHLY REPORTING

Improve the commentary → reuse the template → add KPI definitions.

NEW EMPLOYEE SUPPORT

Use approved policies → connect sources → define an assistant.

START SMALL

Move one familiar task forward by one stage.

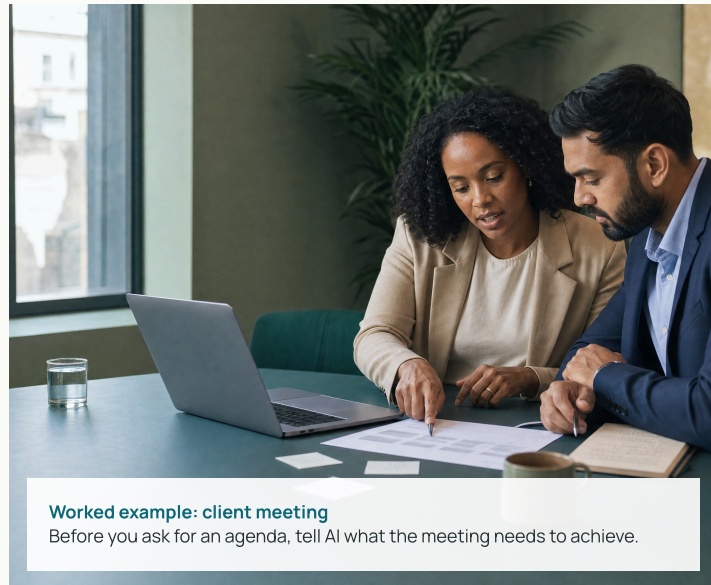
You do not need a new tool or a full transformation to get started. Choose a recurring task, make one useful improvement and keep the learning.

ONE better brief this week

ONE prompt to reuse

ASK: Give AI a better brief

A better answer usually starts with a better understanding of the outcome you want.



Worked example: client meeting
Before you ask for an agenda, tell AI what the meeting needs to achieve.

A SIMPLE PROMPT

“Help me prepare for a client meeting.”

There is nothing wrong with this. It simply leaves AI to make too many guesses.

A MORE USEFUL PROMPT

“I’m meeting an existing client tomorrow. They’re a 120-person professional services organisation we’ve supported for three years. I want to understand their priorities for the next 12 months. Give me five questions and a 45-minute agenda. Keep it conversational and non-technical.”

GOAL	CONTEXT	AUDIENCE	OUTPUT	CONSTRAINTS
What are you trying to achieve?	What should AI understand?	Who is this for?	What should it produce?	Tone, length, format or deadline.

TRY THIS

“I want your help with [task]. Before answering, ask me the questions you need to properly understand what I’m trying to achieve.”

Useful for meeting preparation, HR, finance, operations and sales work.

HOW IT WORKS

Useful context beats more words

AI looks for patterns in the information it has. Relevant clues about your situation, objective and audience make it easier to produce something targeted.

PRO TIP

Tell AI what a good outcome looks like

Instead of “write an update”, say: “The reader should understand the issue in under one minute and know exactly what action they need to take.”

**GOOD BRIEFS
CREATE BETTER WORK.**

Before you press enter

✓ What outcome do I want?

✓ What does AI need to know?

✓ How will I know it is useful?

APPLIES TO COPILOT · CHATOPT · CLAUDE **YOU ARE HERE**

CONVERSE: The first answer is not the finish line

More effective users treat AI as a collaboration: ask, review, correct, challenge and refine.

A BETTER WORKING PATTERN

Ask → review → improve



REQUEST



FEEDBACK



BETTER RESULT

WORKED EXAMPLE · PROJECT DELAY EMAIL

REQUEST

Draft an email explaining our project delay.

YOU

That's too defensive. We need to take ownership.

YOU

Better. Reduce it to around 150 words. The audience is non-technical, so remove the infrastructure terminology.

YOU

Good. Make the final paragraph clearer about what happens next.

HOW IT WORKS

The conversation becomes context

Each useful correction gives AI another clue about what you consider a good result. If the chat becomes muddled, ask it to summarise the important facts, then start clean.

Useful challenges

DOCUMENTS

What are the three weakest parts?

RESEARCH

What assumptions are you making?

DECISIONS

Give me three approaches before recommending one.

MEETINGS

What questions am I likely to be asked?

PRO TIP

Ask AI to challenge you

"I currently believe [view]. Don't simply agree with me. Identify the strongest arguments against my position."

COLLEAGUE RULE

Question it the way you would question a colleague

Ask where a surprising figure came from, what it assumed, what alternatives it considered and whether the evidence is current.

A USEFUL CONVERSATION OFTEN SOUNDS LIKE THIS

"Make it shorter."

"That is too technical."

"What have you assumed?"

REQUEST



CORRECTION



CHALLENGE



BETTER RESULT

REUSE: Turn a good conversation into a better process

WHY THIS MATTERS

Stop starting from scratch.

A productive conversation includes what information matters, what questions to ask, the format that works and what to check. Do not throw that learning away.

Save the process, not just the output.

One final email helps once. A repeatable method helps every time the task recurs.

1

GOOD CONVERSATION

Build a useful approach together.

2

REUSABLE PROMPT

Capture the method and placeholders.

3

REPEATABLE PROCESS

Improve it with each use.

CLIENT MEETING TEMPLATE

“Prepare me for a meeting with [CLIENT]. Attendees: [ATTENDEES]. Objective: [OBJECTIVE]. Review [PREVIOUS ACTIONS] and relevant [BACKGROUND]. Create a [DURATION] agenda and five useful questions.

MANAGEMENT

Weekly management briefing

SALES

Prospect meeting preparation

HR

Interview preparation

FINANCE

Monthly variance commentary

MARKETING

Content briefing

OPERATIONS

Procedure review

HOW IT WORKS

Reusable prompts make individual learning shareable

Clear placeholders such as [CLIENT], [OBJECTIVE] and [AUDIENCE] help colleagues use a proven approach without rebuilding it.

TRY THIS

“Based on everything we’ve learned, create a reusable prompt I can save for next time.”

Ask it to include the information it needs, the questions it should ask and the checks it should make.

THE CLIENT-MEETING JOURNEY

1

Ask for help preparing.



2

Refine the questions and agenda.



3

Save the prompt with placeholders.



4

Improve it after each meeting.

Good process knowledge should become easier to use, not disappear into chat history.

APPLIES TO ALL THREE · IMPLEMENTATION DIFFERS · **YOU ARE HERE**

CONTEXT: Stop explaining the same background

For ongoing work, appropriate context can make AI considerably more useful. Think of the selected information you would give a capable colleague on day one.

Curated knowledge → useful workspace

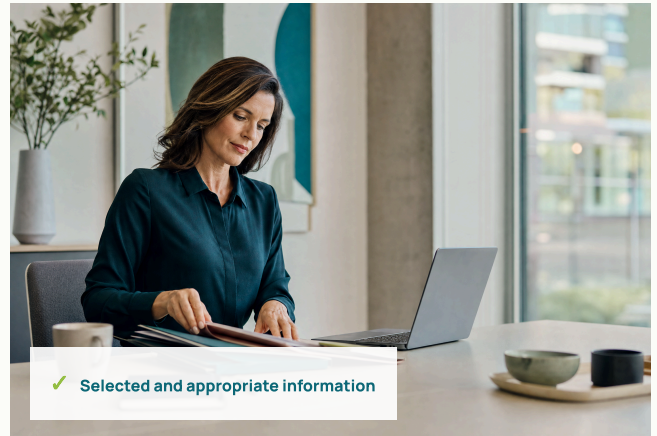
Give AI focused, current material that is relevant to the job, rather than every file you can find.

FILES

PROJECT
INFO

INSTRUCTIONS

>

AI
WORKSPACE

ChatGPT

Projects can bring related chats, files and instructions together. Project memory and connected apps depend on your account, plan and workspace settings.

Look for focused project context

Claude

Projects can contain focused chats, project instructions and a knowledge base. Enhanced project knowledge and sharing depend on plan and organisational configuration.

Look for project knowledge

Microsoft Copilot

Copilot Notebooks can bring selected chats, files, pages, meeting notes and links together. Licensing, OneDrive or SharePoint and rollout affect availability.

Look for curated references

Quick check before you add context

Use an organisation-approved account and pause before sharing anything that may be sensitive.

- ☐ Is it relevant and current?
- ☐ Is it confidential or personal?
- ☐ Am I permitted to use it?
- ☐ How will the service handle data?
- ☐ Could a third party be involved?
- ☐ Does it have the right controls?

PRO TIP

Look for the capability, not the label

Different platforms use different names. The aim is a focused workspace with useful instructions and selected, appropriate material.

EXAMPLE · A CLIENT ABC SOURCE PACK

Enough context to make a routine request meaningful.

CLIENT
OVERVIEWKEY
CONTACTSMEETING
HISTORY

PROPOSALS

ACTIONS &
TERMS

“Prepare me for tomorrow’s Client ABC meeting.”

APPLIES TO ALL THREE · CAPABILITIES DIFFER **YOU ARE HERE**

CONNECT: Bring approved information closer to the work

Constantly copying information between applications limits what an AI assistant can do. Depending on platform, licence and controls, approved connections can make the right material easier to find, summarise and use.

PRO TIP

Connect information because it solves a problem

Do not connect every system because you can. Start with a task where better access to a trusted source will genuinely help.



BEFORE A MEETING

Find correspondence, actions and preparation points.

FIND INFORMATION

Locate the latest approved policy and explain a rule.

DOCUMENT REVIEW

Compare a proposal against requirements and flag gaps.

CRM / SALES

Gather approved information before a call.

Is this worth connecting?

Ask whether the source would materially improve a useful task, then check the access and review boundaries.

✓ Approved account

✓ Correct permissions

✓ Human review stays clear

TRY THIS

"Find the latest approved version of our expenses policy and explain the mileage rules. Include a link to the source."

Capabilities differ by product, licence and organisational configuration.

CONVENIENCE SHOULD NOT OVERRIDE CONTROL

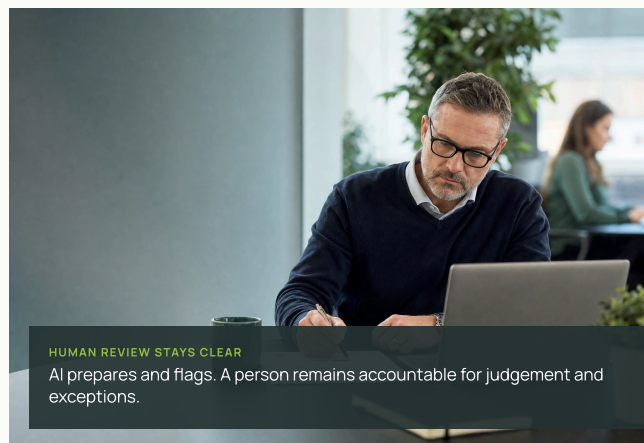
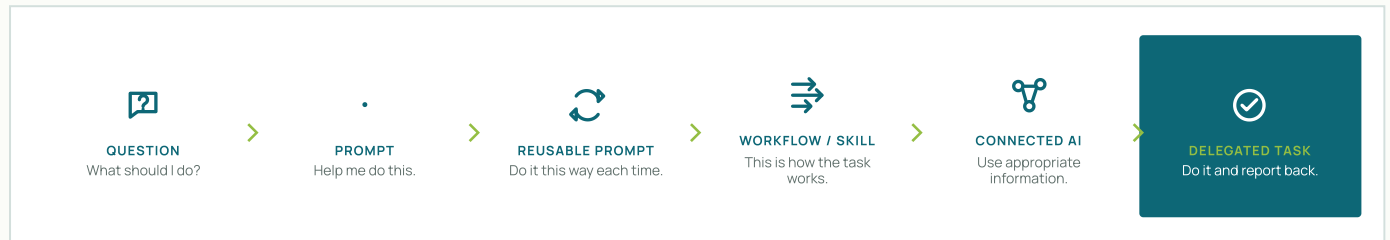
Keep access aligned with existing roles and responsibilities.



APPLIES TO ALL THREE · CAPABILITIES DIFFER **YOU ARE HERE**

DELEGATE: Move from questions to defined jobs

The progression is gradual. Delegate only once the task, sources, output and human review point are understood.



HUMAN REVIEW STAYS CLEAR

AI prepares and flags. A person remains accountable for judgement and exceptions.

What people mean by agents, skills and workflows

A **workflow or skill** tells AI how a particular job should be performed. An **agent** is more like an assistant given a focused role, selected knowledge and, where approved, tools.

WAVEX IN PRACTICE

From useful prompting to business capability

Wavex created a secure AI sales assistant that brought organisational knowledge, repeatable sales activities and CRM-related processes together in a conversational interface.

PRO TIP

Automate the repetitive work, not the important judgement

Start with gathering, summarising, formatting, first drafts and routine administration. Keep people responsible for relationships, exceptions and consequential decisions.

GOOD EARLY CANDIDATES

Weekly industry summary · recurring meeting preparation · approved policy helper · draft management report for review

Exact task, agent and scheduling features vary by platform, licence and administrator setting.

BEFORE YOU DELEGATE

A good task is clear enough for a person to review.

THE JOB	THE INPUTS	THE OUTPUT	THE REVIEW
What happens and when?	What approved sources are needed?	What should the result look like?	Who checks exceptions?

AI can be a capable colleague.

It should not be treated as an infallible authority.

Fluent ≠ Factual

A polished answer can still contain an incorrect assumption, out-of-date detail or invented claim.

VERIFY

Prompts that make verification part of the work

- ✓ What assumptions have you made?
- ✓ Separate facts from assumptions.
- ✓ Which parts should I independently verify?
- ✓ Provide sources for claims that may have changed.
- ✓ Check this calculation again.
- ✓ What are the strongest alternatives?
- ✓ Challenge your own recommendation.
- ✓ What important question have I not asked?

“Act as...” does not create qualifications

“Act as an employment lawyer” can guide perspective, terminology and style. It does not make AI a qualified lawyer. The same applies to medical, financial, security, accounting and legal topics. Use appropriate professional review for material decisions.

VERIFY UNDERPINS EVERY STAGE OF THE JOURNEY



Your next move: choose one ordinary task this month. Give AI a better brief, keep a successful prompt, or add context in an approved workspace. Progress comes from useful practice, not sounding more technical.

MOVE ONE STAGE FORWARD THIS MONTH

Practical progress is a better habit, not blind trust.

ASK → CONVERSE

Stop accepting the first answer.

CONVERSE → REUSE

Save two prompts that work repeatedly.

REUSE → CONTEXT

Create an ongoing approved workspace.

CONNECT → DELEGATE

Identify one task for controlled review.

THE BIGGER OPPORTUNITY

What happens when the whole organisation gets better at AI?

One employee using AI well can save time and improve their work. The bigger opportunity comes when the organisation builds the skills, information, security, processes and governance that help people use it consistently.



- + Less repetitive administration
- + Better reuse of organisational knowledge
- + Faster access to information
- + Faster analysis and document creation
- + More consistent work
- + More time for judgement and relationships

The competitive gap will increasingly be between organisations that have learned how to use AI effectively and those that are still experimenting without a plan.

Start with a focused pilot

You do not need to transform everything at once. A well-designed pilot around a meaningful business problem can show what is practical, what people value, what information it requires and what controls are needed.

- ✓ What is possible
- ✓ What users value
- ✓ Which controls matter
- ✓ Where measurable benefit exists

What could AI do inside your organisation?

Wavex helps organisations move from AI experimentation to practical, secure and repeatable capability.

TALK TO A WAVEX EXPERT

wavex.co.uk/contact-us

[Explore AI Adoption & Implementation](#)

[Further reading: AI Assistants Are Becoming Part of Everyday Work](#)

A PRACTICAL WAY FORWARD

Useful AI adoption starts with the work, not the product.

01
Find a worthwhile use case

02
Set information and review boundaries

03
Build, use, measure and refine