

Putting AI to work in your business

Cheat sheet — keep this beside you this week.

1 · BRIEF IT

Say plainly what you want, like you would to a new starter.

2 · FEED IT

Give it the background: notes, a document, an example of good.

3 · CHECK IT

Read it over before it goes anywhere near a customer.

TRUST THE FIRST DRAFT?

✓ Hand it over

- Drafting emails, quotes, posts
- Summarising long threads & docs
- Thinking out loud through options
- Explaining something complicated

✗ Always check

- Hard facts & figures
- Anything with numbers or maths
- Recent or local specifics — prices, dates
- Judgement calls needing your taste

Always ask “where did you get that?” — make it show its working.

WHAT'S SAFE TO FEED IT

✓ Safe to put in

- General questions & background
- Your own draft text & notes
- Anything already public
- Made-up or anonymised examples

✗ Keep out

- Customer personal details
- Financials & bank details
- Passwords & logins
- Anything confidential

Would you be comfortable if it showed up in public? If not, don't paste it in.

INSTRUCTIONS VS PROJECTS

Your instructions are the base layer — they apply to everything you do, everywhere. A Project sits on top for one job, with its own brief and its own files (past replies, FAQ, price list, examples of good). Every chat inside a Project knows both.

START HERE — YOUR INSTRUCTIONS

“I run a [business type] in the City of Monash. My customers are mostly [who]. Keep the tone [warm and straightforward]. British spelling. Never [your hard rule] without flagging it with me first.”

Find it in Settings → Profile → Personal instructions. Stuck? Ask Claude to interview you and draft it.

YOUR TASK THIS WEEK

01 Write your overall instructions — who you are, what you do, your tone, your rules.

02 Set up one Project — for something you repeat weekly (replies, quotes, posts).

03 Stretch: ask Claude to build you a tool — a quote calculator, a booking checklist.



Help shape the next tutorials

- Scan the code and tell us the one job you'd most love AI to handle.
- We'll build the next tutorials around your real questions and send them to you first.
- Stay connected to Eastern Innovation and Monash Council for more support, events and practical AI help.

