Claude AI for Organizations: Fundamentals for Effective and Responsible Use

Duration: 3,5 hours
Audience: Pour tous

Who is this training for?

This course is intended for employees, professionals, managers and collaborators who are expected to use Claude AI as part of their day-to-day work activities. It is designed for both new users and those who have already experimented with the tool and want to establish a solid foundation of effective, secure and consistent practices within their organization.

Training objectives

Enable participants to use Claude AI effectively, securely and thoughtfully by understanding when and how to use it, how to govern its use within an organizational context, and how to derive value from it without misuse or unnecessary resource consumption.

More specifically, by the end of this course, participants will be able to:

- Navigate the Claude AI environment efficiently.
- Understand the principles of confidentiality, security and responsible AI use within an organizational setting.
- Understand the usage guidelines governing authorized connectors and the rationale behind organizational restrictions.
- Use Claude’s core features in practical workplace situations.
- Craft effective, precise and contextualized prompts to generate relevant results.
- Understand model and token consumption concepts and select the appropriate level of usage based on business needs.
- Structure information and use projects in Claude in a manner consistent with the organization’s intended use cases and practices.
- Distinguish, at an introductory level, Claude use cases from those of other workplace tools, including Microsoft Copilot.
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Identify relevant, responsible and value-driven use cases aligned with their professional responsibilities

Summary

Generative artificial intelligence is transforming the way people work, but its adoption also brings important considerations related to security, confidentiality, governance and the effective use of organizational resources. This course provides participants with the essential knowledge and practical skills required to use Claude AI confidently and responsibly in a professional environment.

Through demonstrations, hands-on exercises and realistic workplace scenarios, participants will learn how to navigate Claude efficiently, craft high-quality prompts, organize work using projects and identify use cases that deliver meaningful business value. The course also explores the limitations of AI, the importance of validating AI-generated outputs, and the governance principles required to support responsible adoption within organizations.

Participants will develop a practical understanding of when to use Claude, how to maximize its value and when other tools, including Microsoft Copilot, may be better suited to the task at hand.
Cette formation vous aidera à adopter une approche réfléchie et responsable de l'IA en comprenant quand utiliser Claude, comment l'utiliser efficacement et dans quelles situations d'autres outils, tels que Microsoft Copilot, peuvent être plus appropriés.

Course outline

Module 1: Exploring the Interface and Essential Features

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- Navigating Claude’s web interface
- Managing conversations
- Basic settings and personalization
- Claude’s core features and capabilities
- Foundational principles for organizing information

Activities

- Guided demonstration
- Initial interactions with Claude
- Simple workplace-based examples

Module 2: Responsible Use, Security, Privacy and Governance

- Protecting organizational information
- Privacy and risk management
- Security settings and controls
- Validating AI-generated outputs
- The importance of human judgment
- The role of internal policies in governing AI use

Activities

- Case studies
- Analysis of common workplace situations
- Discussion of the practical implications of internal governance

Module 3: Connectors, Authorized Scope and Information Management

- Understanding what a connector is
- Authorized and unauthorized connectors
- Organizational considerations related to governance, risk and confidentiality
- Avoiding frustrations related to access limitations

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- Understanding the opportunities and limitations of connecting to the Microsoft 365 environment

Activities

- Contextualized demonstration
- Guided discussion on expected uses and boundaries to be respected
- Analysis of scenarios where the use of a connector is appropriate or inappropriate

Module 4: Projects, Work Organization and Business Value

- Understanding the project framework within Claude
- Structuring information to support work activities
- Using Claude to organize, summarize and advance professional tasks
- Exploring the value Claude can bring to day-to-day work
- Identifying use cases where Claude delivers meaningful business value

Activities

- Demonstration of practical use cases
- Structuring a simple project example
- Discussion of high-value use cases within the client's environment

Module 5: Writing Effective Prompts and Using the Appropriate Level of Capability

- Fundamentals of prompt writing
- The importance of being precise, explicit and contextual
- Techniques for improving results
- Selecting a model that fits the need rather than automatically using the most powerful model
- Understanding token consumption and the costs associated with certain uses
- Evaluating the value of a use case before leveraging more powerful models

Activities

- Hands-on prompt-writing exercises
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Refining professional prompts

- Examples of more efficient and cost-effective prompt reformulations
- Analysis of situations where the level of model capability should be adjusted to the task

Module 6: Positioning Claude Among Other Available Tools

- Differences between Claude and other tools available in the workplace
- When to use Claude and when another tool may be sufficient
- Simple guidelines to help users choose the appropriate tool while maintaining the focus of the training
- Comparison with Microsoft Copilot for use cases supported within the Microsoft 365 environment

Activities

- Analysis of simple scenarios
- Guided discussion on selecting the right tool for the need
- Identification of best practices based on the type of task

Capstone Workshop

Using a realistic workplace scenario, participants will apply what they have learned in order to:

- Formulate a clear and contextualized request
- Produce a useful summary
- Structure information effectively
- Identify a relevant Claude use case within their work environment
- Assess whether the selected use case is appropriate in light of governance, cost and value considerations
- Determine responsible next steps and follow-up actions

Approach and methodology

The course adopts a

practical, progressive and experiential approach designed to establish a common

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foundation for all participants before moving on to more advanced concepts and applications. Demonstrations, exercises and discussions focus on realistic, actionable and well-governed use cases. Through guided exchanges, participants are encouraged to adopt Claude AI thoughtfully in their day-to-day work while considering internal policies, risks, costs and the actual value of AI-enabled activities.

Training Methods

- Interactive presentations
- Live demonstrations
- Guided hands-on exercises
- Case studies
- Group discussions
- Capstone

  workshop based on a realistic workplace scenario

Prerequisites

Access to Claude must be enabled before attending the course.

Recommendations

To

maximize the benefits of the course, participants are encouraged to:

- Be familiar with

  the primary digital tools used in their work environment.
- Have identified a

  few tasks or professional situations for which they would like to explore

  the value of AI.
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Review the

guidelines and best practices in place within their organization regarding the use of artificial intelligence.

- Have concrete

  examples of documents, projects or work assignments that can be used during the hands-on exercises.

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