# GETTING STARTED WITH AI GUIDE

Staying Secure

- Switch on privacy settings In tools like ChatGPT, Check Settings | Data Controls and disable 'Use my data to improve.'
- Never paste confidential info. No tax file numbers, bank details, or private customer records.
- Use business accounts where possible: enterprise/paid AI accounts give more control than free ones.
- Classify data (Public / Internal / Confidential). Keep confidential out of public tools.
- Redact identifiers (names, emails, ABNs) when pasting. Use snippets, not whole files.
- Store outputs in your drive (not chat history). Review audit logs monthly.

How to prompt

Prompt engineering is the process of designing and refining prompts which are basically instructions, questions, or guidelines that we provide to an AI system to guide its responses.
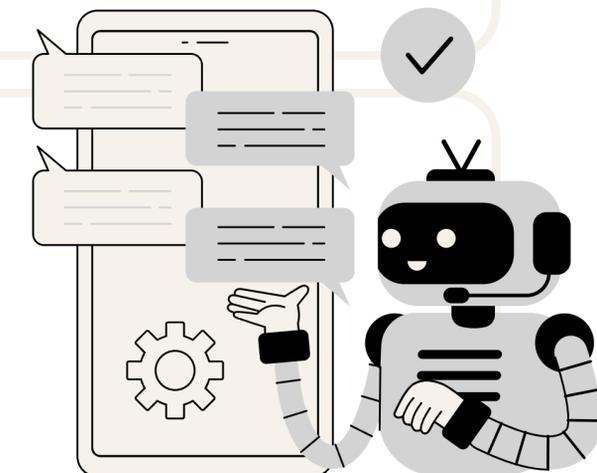
A simple prompt formula is **Persona + Task + Context + Output**
You are a *[persona]*. **Your task is to** *[task]*, **considering** *[context]*. **Provide the result as** *[desired output format]*

A more detailed prompt scaffold (use this shape for anything)

- You are a *[role]*. Help a *[business type]* in *[industry]* to achieve *[goal]*.
- Context: *[paste brief/notes/links]*. Constraints: [*tone, length, reading level, Australian spelling*].
- Output: [*format, e.g., 5 bullets + table + next steps*].
- Check: list assumptions; ask one clarifying question if needed; show a safe version with redactions.

Tip: *Don't expect the first answer to be perfect. Refine your prompt, add details, examples, or change tone.*

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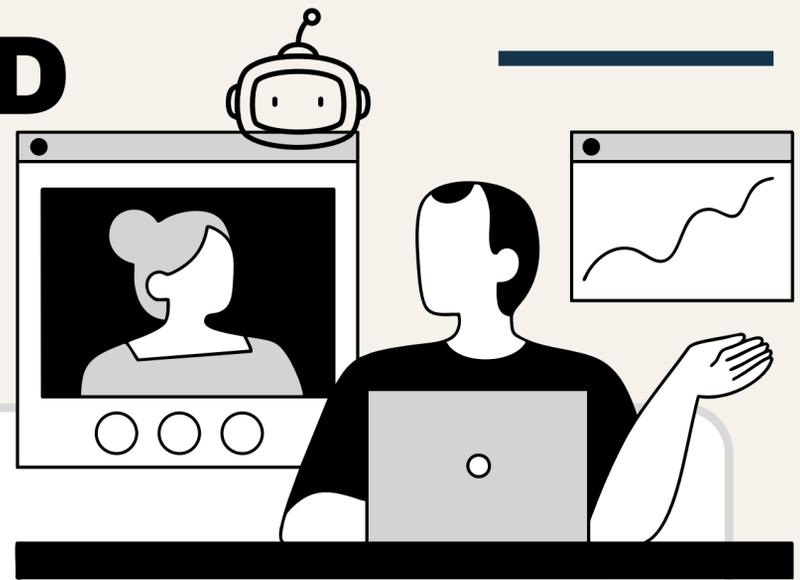
Data matters
- Clean your data (no duplicates, typos, outdated info).
- Feed examples. Give AI a sample of your style or template.
- Keep a prompt library : Save good prompts so you don't reinvent the wheel.

Helper not human
- Always review outputs , check facts, tone, and spelling.
- Add your *human voice,* tweak drafts so they sound like you.
- Think assistant, not expert. AI drafts the email, you decide if it goes to the client.

Ethics
- Check for bias, does it unfairly stereotype?
- Respect copyright. Don't use AI images as logos unless you own the rights.
- Be transparent. If content is AI-assisted, tell customers.

Hallucinations
- AI sometimes confidently makes things up (fake stats, references, links).
- Always fact-check against trusted sources before sharing.

Tip: Ask "What is your source?" or "Give me the reference link."

Integrate
- Many platforms (Outlook, Gmail, Canva, Notion, Shopify) now have AI built in.
- Learn the shortcuts inside the tools you already use.

Start small but start
- Try 3 easy wins:
  - Draft a customer email.
  - Summarise a long document.
  - Generate 5 social media post ideas.
- Measure time saved. If it saves >1 hour a week, it's a keeper.

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What you'll find here: quick privacy safety switches, proven tools (with links), and ready-to-use prompts. Keep it simple, measurable, and human-led.

Links

Privacy & Safety
- Enterprise AI options: Microsoft 365 Copilot · Gemini for Google Workspace · ChatGPT Team/Enterprise
- Data regions (where your data lives): Microsoft 365 data locations · Google Workspace data regions
- Data Loss Prevention (DLP): Microsoft Purview DLP overview · Google Workspace DLP overview

General Tools
- Research & drafting: ChatGPT (Team/Enterprise) · ChatGPT Team · Perplexity
- Design & creative: Canva Magic Studio · Leonardo.ai (images/video) · Veo 3 (video via Google)
- Sales stack: HubSpot CRM · Apollo.io (prospecting + sequences) · Calendly (booking/routing) · Fireflies.ai (call notes/actions)
- Workspace suites: Google Workspace + Gemini · Microsoft 365 + Copilot · Notion AI

Sales Tools
- Conversation Intelligence: Gong · Zoom Revenue Accelerator · HubSpot Conversation Intelligence
- Enablement & skills: Mindtickle · Seismic (Lessonly) · Highspot
- Pipeline & next-best-action: Clari · Salesforce Einstein · HubSpot Playbooks

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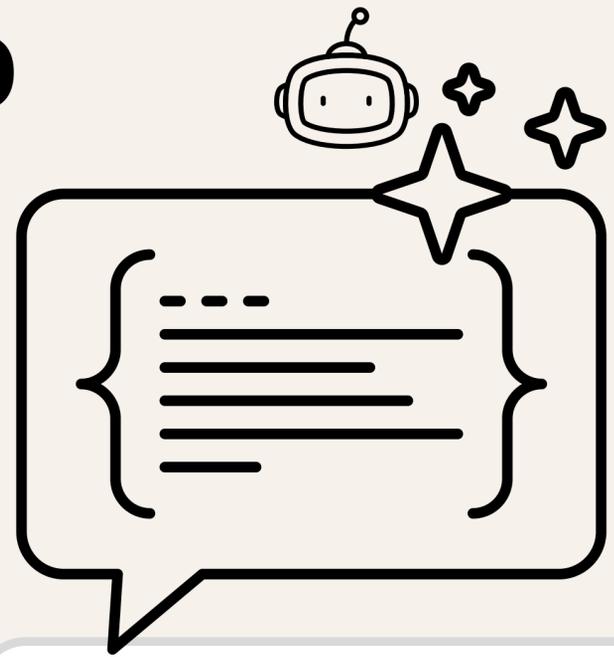
Copy/Paste these prompts

Sales

- Turn these notes into a client email that confirms decisions, owners, and due dates. Friendly, direct; 120–160 words.
- From this call transcript, extract objections + winning responses. Output a table: Objection | Best reply | Evidence link | Next step.
- Draft 3 follow-up messages for a no-show. Vary tone (friendly / value-first / deadline-driven). 90–120 words each.
- Write a 7-step outreach sequence for [buyer persona]. One-line value prop per step; channel: LinkedIn + email; include subject lines.

Marketing

- Summarise the last 24h of news on [topic] into a 120-word LinkedIn post + 5 relevant hashtags. Plain English, Aussie spelling.
- Repurpose this blog into: 1 LinkedIn post (120w), 1 Facebook post (80w), 3 tweet options (<280 chars). Keep facts; add CTA to [URL].
- Give 5 headline options for this video. Style: benefit-first, no hype, 55–65 characters.
- Create a content calendar: 4 weeks, 3 posts/week for [industry]. Columns: Date | Topic | Angle | Format | CTA.

Customer Experience (CX)

- Draft a polite, on-brand reply to this customer complaint. Acknowledge, apologise, propose 2 remedies, ask 1 confirming question.
- Turn these support tickets into a knowledge-base FAQ. Output: Q, short A, link to policy, tag(s).
- Write a voicemail script for after-hours: 20–25s, calm tone, collect name/number/topic, promise response by [time].

Administration/HR

- Draft a job ad for [role]. 120–150 words; lead with outcomes; include 3 must-haves, 3 nice-to-haves, and how to apply.
- Summarise these resumes into a comparison table: Candidate | Key skills | Red flags | Questions for interview.
- Create a 30-60-90 onboarding plan for [role]. Include milestones, training links, and success measures.

Tip: Add context, format, tone, and length to every prompt. Ask for assumptions and a final 'risks & checks' line.

Microsoft Copilot

- **Outlook** — Recap this thread in 5 bullets; draft two reply options (friendly/direct); suggest a subject line.
- **Teams** — Summarise the meeting: decisions, owners, due dates; create next agenda with timeboxes.
- **Word** — Turn these 3 docs into a 1-page brief; add risks and 3 options with pros/cons.
- **PowerPoint** — Build 5 slides from this brief: Problem, Impact, Options, ROI, Next steps.
- **Excel** — Highlight outliers; add a 'Next actions' column; give a 4-line summary.
- **OneNote** — Organise these notes into a project plan with milestones and owners.

Data & analysis

- From this spreadsheet, calculate key metrics (define them), then write 5 insights and 3 actions. Keep it to 120 words.
- Create a before/after ROI summary using: hours saved/week, response time, meetings booked, win rate. Output as a short exec summary.

Privacy & safety

- Summarise this thread **without names**; replace identifiers with [Client], [Staff], [ABN####]; list issues and safe next steps.
- Draft a response that avoids sharing confidential data. Suggest what can be said publicly vs internally.

7 TILES / SEVEN