

TRAINING MANUAL

Artificial Intelligence for Strategic Leadership

**Faster and Better Decision Making for
Top Executives**

DATE

7th - 8th
August 2026

VENUE

Linkage Plaza, Plot 20, Block 94, Providence
Street, Off Adewunmi Adebimpe Street, Lekki
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T r a i n i n g M a n u a l

Artificial Intelligence for Strategic Leadership

Faster and better decision making for Top Executives.

A Two-Day Executive Handbook

Microsoft 365 Copilot · Claude · Gemini Notebook

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August 2026

How to Use This Manual

This is one handbook for a two-day programme. Day 1 covers Microsoft 365 Copilot; Day 2 covers Claude Projects and Gemini Notebook. The chapters run in a single sequence from 1 to 42, grouped into ten parts, and every cross-reference points to a chapter number.

HOW EACH CHAPTER IS LAID OUT

- Outcome states what you should be able to do by the end of the chapter.
- In brief explains the concept in plain terms before any procedure.
- How to do it gives the steps, numbered from one within that chapter.
- In practice shows the capability at work in a realistic Linkage situation.
- Copy-ready prompt is a reusable starting point you adapt with the bracketed placeholders.
- Check before you rely on it lists what to verify before the output is used or shared.

TWO THINGS TO HOLD THROUGHOUT

- The tool drafts; you decide; your name is on it. Verification scales with business risk, and the authorised person remains accountable.
- On Claude and Gemini Notebook you are outside Linkage's Microsoft 365 boundary. Classify every document with the Green, Amber, Red rule in Chapter 25 before you upload it.

A NOTE ON PRODUCT CHANGE

Microsoft 365 Copilot, Claude and Gemini Notebook all change frequently, and features vary by licence, tenant and plan. Where this manual and the live product differ, confirm the Linkage environment with IT, and treat Linkage policy as authoritative.

The Two-Day Programme

Indicative timings. The facilitator may adjust the pace to the room, but the sequence and outcomes hold.

DAY 1 · MICROSOFT 365 COPILOT

Time	Session	Participant outcome
09:00	Programme opening	Set a personal learning objective.
09:20	Executive value and orientation	Select a use case and produce a first useful result.
10:30	Break	
10:45	Evidence, protection and accountability	Use appropriate sources and apply risk-based review.
11:30	Executive prompting	Build and improve one executive prompt.
12:30	Communication and meetings	Summarise communication and recover actions.
13:15	Lunch	
14:00	Documents, data and presentations	Draft, analyse and present from approved sources.
15:05	Break	
15:20	Extended capabilities and adoption	Understand advanced options and set a 30-day plan.
15:55	Close	Confirm workplace practice.

DAY 2 · CLAUDE PROJECTS AND GEMINI NOTEBOOK

Time	Session	Participant outcome
09:00	Recap and information boundary	Classify information before using external AI services.
09:20	Applied AI tool selection	Select the appropriate tool for each work pattern.
10:15	Reusable production workspaces	Design one focused Project.
11:30	Break	
11:45	Project output and quality control	Produce, test and document a reusable Project.
13:00	Lunch	
14:00	Grounded source work	Build and interrogate a source-grounded notebook.

Time	Session	Participant outcome
15:30	Break	
15:45	Multi-format communication	Convert verified sources for different audiences.
17:15	Integrated workflow and action plan	Complete the 90-day implementation plan.

Programme Learning Path

Ten parts carry both days in a single arc, from foundations to an integrated workflow.

Part	Chapters	Purpose
I Foundations	1 to 4	Value, product experiences, conversations and grounding.
II Responsible Executive Use	5 to 7	Protect information and verify according to risk.
III Prompting for Executive Work	8 to 11	Build, refine, stress-test and reuse strong prompts.
IV Microsoft 365 Applications	12 to 16	Copilot in Outlook, Teams, Word, Excel and PowerPoint.
V Extended Capabilities	17 to 20	Pages, Researcher, Analyst and agents.
VI Sustaining Adoption	21 to 22	Build a 30-day habit and prepare for Day 2.
VII Tool Selection and Boundaries	23 to 25	Choose the right tool and classify information before uploading.
VIII Reusable Production Workspaces	26 to 31	Design, instruct, test and hand over Claude Projects.
IX Grounded Source Work	32 to 36	Build, interrogate, map and share Gemini notebooks.
X Multi-Format Communication and Integration	37 to 42	Reach every audience, and combine the tools into one workflow.

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PART I	

Foundations

Where Copilot creates value, the product experiences, managing conversations, and grounding your work in evidence.

ORIENTATION

Getting into Copilot

IN BRIEF

Before the chapters that follow, this page shows how to open Copilot and set it up correctly. Much of Day 1 assumes you can already reach the tool and that it is grounded in Linkage data.

Where to find it The Microsoft 365 Copilot app (from the app launcher, the waffle menu at the top of any Microsoft 365 page, or m365.cloud.microsoft), and the Copilot icon on the Home ribbon inside Word, Excel, PowerPoint, Outlook and Teams.

THREE WAYS IN

- 1 Open the Microsoft 365 Copilot app. It opens on Copilot Chat, the conversational surface used throughout Day 1.
- 2 Or, inside an Office application, select the Copilot icon on the Home ribbon to open the Copilot pane on the right.
- 3 Or, use the app launcher (the waffle menu) and choose Microsoft 365 Copilot.

SET IT UP BEFORE YOU ASK

- Work IQ toggle, at the top left of Copilot Chat. On grounds answers in your Linkage work data through the Microsoft Graph and the web; off uses the web only. For anything about Linkage, switch it on.
- Enterprise data protection. Confirm you are signed in with your Linkage account, not a personal one. In the protected experience your prompts and responses are not used to train the underlying models.
- Chat and Cowork. The app also has a Chat and Cowork toggle. This manual works in Chat.

LABELS VARY

What you see depends on your licence and how Linkage has configured the tenant, and Microsoft changes labels often. Where this manual and the screen differ, confirm the current label and placement with IT, and treat Linkage policy as authoritative.

Where Copilot Creates Executive Value

Outcome *Identify one recurring task where Copilot reduces preparation without delegating judgement.*

IN BRIEF

A strong use case is frequent, information-heavy, draftable, supported by accessible evidence, and reviewable before it creates external impact. Copilot should prepare material for judgement, not replace accountability.

WHY IT MATTERS AT LINKAGE

Executives gain little from feature demonstrations unless those features connect to recurring decisions, communications and management routines. The practical value lies in reducing the effort required to find, read, organise and draft information.

HOW TO DO IT

- 1 Review the last two working weeks and list recurring tasks.
- 2 Score each task for frequency, information effort, draftability, evidence availability and reversible risk.
- 3 Select one task where the output can be reviewed before use.
- 4 Record a baseline such as time spent or revision cycles, without assuming a saving in advance.

IN PRACTICE

A department head prepares a weekly Executive Committee update by rereading emails, meeting notes and reports. Copilot can organise the available material into themes and a first draft. The department head still decides what matters, verifies the evidence and approves the message.

COPY-READY PROMPT **Select my starting use case**

I am [ROLE] at Linkage Assurance Plc. My recurring tasks are [LIST].

Assess each task for frequency, information effort, draftability, evidence availability and risk if the first draft is wrong.

Present: Task | Suitable Copilot pattern | Expected benefit | Main risk | Verification required.

Recommend one starting task. Do not estimate time saved unless I provide baseline data.

CHECK BEFORE YOU RELY ON IT

- ☐ The task is genuinely recurring and information-heavy.
- ☐ The output can be reviewed before it creates external impact.
- ☐ A baseline is recorded rather than assumed.

ON YOUR OWN

- Review two weeks of work and list recurring tasks.

- Choose one and record a baseline before you start using Copilot on it.

In a line *Start where the work is frequent, draftable and reviewable, not where the demo is impressive.*

CHAPTER 2

Copilot Chat and In-App Experiences

Outcome *Choose the right Copilot starting point for the task in front of you.*

IN BRIEF

Copilot Chat suits conversational work and, where licensed and configured, supported grounding across work information. In-app Copilot works inside Outlook, Teams, Word, Excel or PowerPoint. Exact labels and capability vary by licence and tenant.

Where to find it The Microsoft 365 Copilot app (Copilot Chat), and the Copilot icon on the Home ribbon inside Outlook, Teams, Word, Excel and PowerPoint.

WHY IT MATTERS AT LINKAGE

Using the wrong surface adds unnecessary copying, formatting and rework. Match the experience to the artefact or the set of sources involved.

HOW TO DO IT

- 1 Decide whether the task spans several sources or acts on one open artefact.
- 2 For cross-source work, open the Microsoft 365 Copilot app and use Copilot Chat, with the Work IQ toggle on.
- 3 For one email, meeting, document, workbook or deck, open that application and select the Copilot icon on the Home ribbon.
- 4 Confirm the grounding or advanced capability you need is enabled, and that you are on your Linkage account.

IN PRACTICE

An executive needs both an account history and a revision to one renewal letter. The account history belongs in a supported cross-source chat experience. The letter revision belongs in Word or Outlook, where the artefact is already open.

COPY-READY PROMPT Choose the right experience

For each task below, recommend the best Microsoft 365 Copilot starting point and explain why:

[LIST TASKS]

Use only these options: Copilot Chat, Outlook, Teams, Word, Excel or PowerPoint. State any capability or licence dependency I should confirm with IT.

CHECK BEFORE YOU RELY ON IT

- ☐ The selected experience can reach the required source.
- ☐ The output lands where it can be reviewed efficiently.
- ☐ Licence and configuration are confirmed.

ON YOUR OWN

- Classify five tasks you completed last week.
- Repeat one in the recommended app and compare the revision effort.

In a line *Work across sources in chat where supported; act on an open artefact in its application.*

CHAPTER 3

Managing Conversations and Context

Outcome *Use conversations deliberately, and know when to continue or restart.*

IN BRIEF

Copilot uses the ongoing conversation as context. Continue in the same conversation when refining the same deliverable. Start a clean one when the task, audience, source or sensitivity has materially changed, or the response has drifted from the brief.

WHY IT MATTERS AT LINKAGE

The conversation as context improves refinement, but unrelated topics and accumulated instructions reduce clarity and can carry constraints where they do not belong.

HOW TO DO IT

- 1 Begin with a complete brief.
- 2 Use short follow-ups to change one dimension at a time.
- 3 Restate non-negotiable constraints when they matter.
- 4 Start again when the task changes or the original brief is no longer recoverable.

IN PRACTICE

An executive drafts a broker note, then asks unrelated questions about a management report in the same conversation. A clean conversation for the report prevents the earlier tone and constraints from influencing the new task.

COPY-READY PROMPT Reset a drifting task

We are starting a clean task.
Goal: [TASK AND OUTPUT].
Context: [AUDIENCE, PURPOSE, BACKGROUND].
Source: [APPROVED SOURCE].
Expectations: [LENGTH, TONE, STRUCTURE, INCLUSIONS, EXCLUSIONS].
Ignore any assumptions not supported by this brief or the source.

CHECK BEFORE YOU RELY ON IT

- ☐ The current task matches the conversation context.
- ☐ No confidential context is being carried into an unrelated task.
- ☐ The source and audience remain correct.

ON YOUR OWN

- Take one old conversation that drifted.
- Rewrite the task as a clean brief and compare the result.

In a line *Keep refinement together; separate unrelated tasks and changed sources.*

CHAPTER 4

Grounding and Source Selection

Outcome *Distinguish public, organisational and specifically referenced evidence, and choose the source yourself when it matters.*

IN BRIEF

Grounding means using relevant source material to support a response. The source may be public information, permitted organisational content, or items you explicitly reference. For consequential work, choose the exact source and confirm the cited passage supports the claim.

Where to find it Copilot Chat with the Work IQ toggle on, and the Reference and file-attachment controls inside the Office apps.

WHY IT MATTERS AT LINKAGE

A fluent answer is not evidence. Executive work requires clarity about what material supports each factual claim.

HOW TO DO IT

- 1 Decide whether the question is about the external world, Linkage, or a named artefact.
- 2 For Linkage questions, turn the Work IQ toggle on so Copilot draws on the Microsoft Graph.
- 3 Reference the exact file, email or meeting: attach it, or type / followed by the file name where the app supports it.
- 4 Require citations, gaps and inference to be visible in the response.
- 5 Open and read the decisive source before you act.

IN PRACTICE

A preliminary quotation, revised quotation and signed slip all contain different terms. The executive directs Copilot to the signed slip and confirmation email, rather than asking a broad question that may blend superseded material.

COPY-READY PROMPT Grounded executive brief

Using only [NAMED SOURCES], prepare a briefing on [ISSUE].

Provide: current position; chronology; explicit decisions; open commitments; contradictions; evidence gaps.

Cite the exact source after every factual statement. Prefix inference with "Inference:". Where the sources do not answer, write "No evidence found".

CHECK BEFORE YOU RELY ON IT

- ☐ The correct document version was used.
- ☐ Every material claim has a traceable source.
- ☐ Inference is separate from fact.
- ☐ The source date and authority are appropriate.

ON YOUR OWN

- Compare two versions of an approved document.
- Verify three reported differences against the originals.

In a line *When consequences matter, select the source yourself and verify the decisive passage.*

Responsible Executive Use

Protecting information, respecting permissions, and verifying according to business risk.

CHAPTER 5

Enterprise Data Protection and Appropriate Use

Outcome *Apply a practical pause before entering or sharing information.*

IN BRIEF

Microsoft 365 Copilot operates within enterprise controls documented by Microsoft, but organisational policy and user permissions remain central. A licence is not permission to use every item you can technically access.

WHY IT MATTERS AT LINKAGE

Linkage handles personal, financial, medical, commercial and regulated information. Approved enterprise technology still requires authorised use, appropriate purpose and minimum necessary disclosure.

HOW TO DO IT

- 1 Confirm the account and service are approved by Linkage.
- 2 Confirm you are authorised to use the information for this purpose.
- 3 Use the minimum data needed.
- 4 Never enter credentials or secrets.
- 5 Follow Linkage retention, review and escalation procedures.

IN PRACTICE

A claims summary contains medical records and bank details. Before using Copilot, the employee confirms the task is authorised, works within the approved Linkage environment, and uses only information necessary for the summary.

COPY-READY PROMPT **Data-minimised task brief**

Using the approved source [SOURCE], create a management summary for [PURPOSE].

Exclude unnecessary personal identifiers and details not material to the decision.

Do not reproduce bank details, credentials or unrelated sensitive information.

List any information you excluded because it was not necessary for the stated purpose.

CHECK BEFORE YOU RELY ON IT

- ☐ The system and account are approved.
- ☐ Access is authorised for this purpose.
- ☐ The prompt contains no credentials.

- ☐ Personal or sensitive data is limited to what is necessary.
- ☐ The output will be stored and shared appropriately.

ON YOUR OWN

- Review one routine task for unnecessary data exposure.
- Rewrite the prompt to minimise personal detail.

In a line *Approved technology does not replace authorised purpose, data minimisation or policy.*

CHAPTER 6

Permissions, Oversharing and Information Hygiene

Outcome *Recognise how existing access and poor information organisation affect Copilot results.*

IN BRIEF

Copilot does not create good information management. It reflects the organisation's permissions, naming, versioning and storage practices. Better source hygiene improves retrieval and reduces ambiguity.

WHY IT MATTERS AT LINKAGE

Copilot uses information you are permitted to access. If material is over-shared, poorly named, duplicated or stored outside the accessible environment, results may be incomplete or expose existing governance weaknesses.

HOW TO DO IT

- 1 Check whether the information exists in Microsoft 365 or elsewhere.
- 2 Confirm access is appropriate, not merely technically available.
- 3 Use clear names and approved shared locations.
- 4 Identify the authoritative version.
- 5 Report inappropriate access through Linkage procedures.

IN PRACTICE

An executive asks for the latest approved procedure, but several files are named "final". The correct action is to identify the approved version and improve storage and naming, not to trust whichever file Copilot retrieves first.

COPY-READY PROMPT **Information hygiene review**

Using only the files I have selected, identify:

1. Duplicate or near-duplicate documents
2. Conflicting dates or version labels
3. Statements indicating approval status
4. Information that appears outdated

Do not declare a document authoritative unless the source explicitly supports that conclusion. List items requiring a document owner to confirm.

CHECK BEFORE YOU RELY ON IT

- ☐ Access is appropriate for the role.
- ☐ The authoritative version is confirmed.
- ☐ No conclusion rests solely on a filename.
- ☐ Any oversharing concern is escalated.

ON YOUR OWN

- Review one shared folder you use regularly.
- Identify one naming or versioning improvement.

In a line *Copilot quality depends on information quality, permissions and confirmed versions.*

CHAPTER 7

Verification and Human Accountability

Outcome *Apply verification effort proportionate to business risk.*

IN BRIEF

Verification is a process, not a final glance. Check names, dates, figures, quotations, clauses, citations, calculations and assumptions against the approved source, and increase verification as potential impact rises.

WHY IT MATTERS AT LINKAGE

AI-assisted content can be fluent and plausible even when a detail is wrong. Insurance work may affect customers, brokers, regulators, financial reporting and legal obligations.

HOW TO DO IT

- 1 Classify the output as low, medium, high or critical risk.
- 2 Identify every material claim and source.
- 3 Reproduce important calculations.
- 4 Obtain second review or formal sign-off where required.
- 5 Keep the final approval with the authorised person.

IN PRACTICE

Copilot drafts a claims decision letter with a plausible exclusion. The claims officer opens the actual policy wording, verifies the clause, and follows the approved review process before any communication is issued.

COPY-READY PROMPT Verification audit

Create a verification table for this output:

Claim | Type | Exact source | Confidence | Manual check required.

Classify each claim as direct source, paraphrase, calculation, inference or general knowledge.

List all figures, dates, names, quotations, clauses and regulatory references requiring direct verification.

State what the available evidence did not answer.

CHECK BEFORE YOU RELY ON IT

- ☐ Every material fact was checked.
- ☐ Citations support the claims made.
- ☐ Calculations were reproduced or reconciled.
- ☐ Required reviewers and sign-offs were completed.

ON YOUR OWN

- Audit one output from the workshop.
- Choose the single highest-risk statement and verify it directly.

In a line *Copilot drafts and assists; the authorised human remains accountable.*

Prompting for Executive Work

Build a complete prompt, shape it to a decision, challenge the draft, and turn what works into reusable assets.

CHAPTER 8

The GCSE Prompt Framework

Outcome *Write a complete prompt that produces a stronger working draft.*

IN BRIEF

GCSE stands for Goal, Context, Source and Expectations. Goal defines the artefact. Context defines audience and purpose. Source defines evidence. Expectations define length, tone, structure and boundaries.

WHY IT MATTERS AT LINKAGE

Weak prompts create avoidable revision. A structured brief gives Copilot the task, business context, evidence and quality standard in one pass.

HOW TO DO IT

- 1 Write the required output as a direct instruction.
- 2 State who will use it and what decision or action it supports.
- 3 Name the approved source.
- 4 Specify length, tone, structure, inclusions and exclusions.
- 5 Require citation and visible uncertainty.

IN PRACTICE

The Executive Committee needs a one-page explanation of motor performance. The prompt states the decision required, names the performance pack and claims analysis, sets the structure, and forbids unsupported figures.

COPY-READY PROMPT GCSE master template

GOAL: Draft / summarise / analyse [TASK] as [OUTPUT].

CONTEXT: I am [ROLE]. The audience is [AUDIENCE]. They need to [PURPOSE / DECISION].
Background: [BACKGROUND]. Sensitivities: [ISSUES].

SOURCE: Use only [APPROVED SOURCES]. Do not fill gaps with general knowledge.

EXPECTATIONS: [LENGTH]. [TONE], British English. Structure: [SECTIONS]. Include [ITEMS].
Avoid [PROHIBITIONS]. Cite each factual claim and flag inference.

CHECK BEFORE YOU RELY ON IT

- ☐ All four elements are present.
- ☐ The source is specific and permitted.
- ☐ The output standard is testable.
- ☐ No unauthorised commitment is requested.

ON YOUR OWN

- Write one task first as a one-line prompt.
- Rewrite it using GCSE and compare the revision effort.

In a line *The Source element is essential whenever accuracy and organisational context matter.*

CHAPTER 9

Building a Prompt from a Business Objective

Outcome *Translate an executive need into a decision-ready output.*

IN BRIEF

Move from "help me with this topic" to a concrete deliverable: a decision brief, board-paper section, meeting brief, draft response, comparison or analysis. Copilot performs better when the decision, audience and output are defined.

WHY IT MATTERS AT LINKAGE

Executives often begin with a topic rather than a precise artefact. Naming the artefact and the decision it supports is what turns a generic answer into a usable one.

HOW TO DO IT

- 1 State the business decision or action.
- 2 Define the artefact that will support it.
- 3 Identify what the audience already knows.
- 4 Select the evidence.
- 5 Add sensitivities, boundaries and verification requirements.

IN PRACTICE

A difficult renewal meeting requires more than a generic summary. The executive requests a two-page briefing with the evidence, likely objections supported by correspondence, authorised boundaries, and unresolved questions.

COPY-READY PROMPT **Difficult renewal brief**

Prepare a two-page briefing for my renewal meeting with [CLIENT] on [DATE].

Context: [RELATIONSHIP, CLAIMS POSITION, COMMERCIAL SENSITIVITY, AUDIENCE].

Use only [CLAIMS REPORT], [CURRENT SCHEDULE] and [CORRESPONDENCE].

Structure: position; evidence; likely objections supported by sources; authorised response; unresolved questions.

Do not recommend a rate or concession I have not authorised. Cite every figure and state evidence gaps.

CHECK BEFORE YOU RELY ON IT

- ☐ The decision and audience are explicit.
- ☐ "Likely objections" are evidence-based, not speculation.
- ☐ Commercial boundaries are stated.
- ☐ Figures are traceable.

ON YOUR OWN

- Turn one upcoming meeting into a concrete briefing artefact.
- Run the prompt and mark what required executive judgement.

In a line *Define the business artefact and decision before asking Copilot to write.*

CHAPTER 10

Refining and Challenging an Output

Outcome *Improve a draft through targeted follow-up prompts.*

IN BRIEF

The first response is a working draft. Useful refinement changes one dimension at a time and deliberately tests omissions, assumptions and counterarguments, rather than only making the text sound better.

WHY IT MATTERS AT LINKAGE

Refinement is where executive judgement enters. Asking what was omitted, what is uncertain, and what a sceptical reader would challenge surfaces the gaps a polished draft hides.

HOW TO DO IT

- 1 Review the first output against the brief.
- 2 Choose one weakness to fix.
- 3 Use a precise follow-up.
- 4 Stress-test the recommendation.
- 5 Restart with a better initial brief if repeated refinement fails.

IN PRACTICE

A performance note reads positively but omits concentration risk. The executive asks what relevant material was left out, then adds a risk section and verifies the figures.

COPY-READY PROMPT Four-step refinement

1. What relevant material did you leave out, and why?
2. Restructure as: Position | Evidence | Risks | Recommendation. Keep under [N] words.
3. Give the strongest reasonable argument against the recommendation and identify the weakest assumption.
4. Which exact statements are least certain, and what must I verify before presenting this?

CHECK BEFORE YOU RELY ON IT

- ☐ Refinement did not remove material facts.
- ☐ New claims are sourced.
- ☐ The counterargument is reasonable and evidence-based.
- ☐ Uncertainty is visible.

ON YOUR OWN

- Run the four-step sequence on one output.
- Record the most important omission it revealed.

In a line *Use refinement to direct and challenge the draft, not merely to polish it.*

CHAPTER 11

Reusable Prompts and Personal Preferences

Outcome *Turn successful prompt patterns into repeatable assets.*

IN BRIEF

Save prompts that support recurring tasks. Replace changing details with bracketed placeholders, give each a descriptive purpose, and review before reuse. Personal preferences can store general style choices, but never client-specific confidential detail.

WHY IT MATTERS AT LINKAGE

Rewriting good prompts from memory wastes effort and risks leaving outdated project details inside a template.

HOW TO DO IT

- 1 Save only prompts you have tested.
- 2 Replace specific names, dates and figures with placeholders.
- 3 Record when and why to use the prompt.
- 4 Keep source and verification instructions.
- 5 Review templates and personal preferences periodically.

IN PRACTICE

A weekly update prompt becomes a reusable asset after the department head removes last week's names and dates, keeps the source window, and adds a citation requirement.

COPY-READY PROMPT Reusable weekly update

[REUSABLE: run for the week ending DATE]

Using my permitted Linkage work data from the past seven days, draft an update for [AUDIENCE].

Sections: Headline | Progress | Issues | Decisions | Next Week | Attention Required.

Maximum 350 words. Cite each factual claim. Label inference. If a section is empty, write "Nothing to report".

CHECK BEFORE YOU RELY ON IT

- ☐ No old client, date or figure remains hidden.
- ☐ The source window is appropriate.
- ☐ The prompt still matches the current reporting process.
- ☐ Outputs remain subject to review.

ON YOUR OWN

- Create a prompt library document.
- Add three tested prompts from Day 1.

In a line *A prompt is reusable only when variables, sources and review requirements are explicit.*

PART IV

Microsoft 365 Applications

Copilot in Outlook, Teams, Word, Excel and PowerPoint, applied to real executive artefacts.

CHAPTER 12

Copilot in Outlook

Outcome *Compress email reading and improve important messages.*

IN BRIEF

Use Outlook to summarise the open thread, identify commitments, and coach a draft for clarity, tone, completeness and unintended commitments. Product features vary by configuration.

Where to find it The Copilot icon on the Outlook ribbon, the Summary by Copilot banner at the top of a thread, and the Copilot draft and coaching tools in the compose window.

WHY IT MATTERS AT LINKAGE

Email is a major source of executive reading, commitments and relationship risk. Thread summaries and draft coaching reduce cognitive load without lowering communication standards.

HOW TO DO IT

- 1 Open the thread, then use Summary by Copilot at the top to get the chronology and commitments.
- 2 Confirm what is agreed, outstanding, and required from you.
- 3 Draft the reply with Copilot in the compose window, or select a passage and ask Copilot to adjust length, tone or structure.
- 4 Use Coaching by Copilot to check clarity, tone and unintended commitments.
- 5 Read and verify every line before you send.

IN PRACTICE

A broker has chased a renewal issue across a long thread. Copilot identifies the explicit commitments and the unresolved question. The executive drafts a concise response and checks that no unauthorised term is promised.

COPY-READY PROMPT Thread summary and response brief

Summarise this thread as [ROLE].

Provide: subject; chronology of explicit agreements; current positions; outstanding items with owner and stated deadline; the response required from me; contradictions.

Then draft a response brief stating what my email must cover. Do not draft a commitment not supported by the thread or my instruction.

CHECK BEFORE YOU RELY ON IT

- ☐ Recipients are correct.
- ☐ Every figure, date and commitment is verified.
- ☐ Tone suits the relationship.
- ☐ No hidden or quoted text creates confusion.

ON YOUR OWN

- Use an approved historic thread.
- Compare the summary to the actual messages.

In a line *Use Copilot to read and coach; the executive still owns the message sent.*

CHAPTER 13

Copilot in Teams

Outcome *Recover meeting and chat substance with clear attribution.*

IN BRIEF

Where the relevant transcript or chat exists and the feature is enabled, Copilot can summarise discussion, answer questions and organise actions. Invitees do not prove attendance, and an unstated owner or deadline should not be invented.

Where to find it The Copilot button in a Teams meeting and in meeting Recap, and the Copilot icon in a Teams chat. Requires transcription or recording to be on.

WHY IT MATTERS AT LINKAGE

Meeting value depends on decisions and actions that survive the conversation. Copilot can organise available transcripts and chats, but the source scope must be understood.

HOW TO DO IT

- 1 Confirm the meeting was transcribed or recorded, or that the relevant chat exists.
- 2 Open Copilot in the meeting, in Recap afterwards, or in the chat.
- 3 Ask for purpose, decisions, actions, and unresolved points.
- 4 Require "Not assigned" or "Not stated" where ownership or a deadline was not given.
- 5 Check the cited passages, then transfer approved actions into the formal tracker.

IN PRACTICE

An executive misses part of a committee meeting. The summary surfaces an action affecting the executive's department. The executive checks the transcript, confirms the owner and deadline, and updates the formal tracker.

COPY-READY PROMPT Meeting recovery

Summarise this meeting using only the available meeting content.

1. Purpose and outcome

2. Decisions explicitly taken
3. Actions: Action | Owner | Deadline stated | Evidence
4. Unresolved points and differing positions
5. Matters relevant to [AREA]

If ownership or deadline was not stated, write "Not assigned" or "Not stated". Do not infer attendance from the invite list.

CHECK BEFORE YOU RELY ON IT

- ☐ The meeting was actually transcribed or source content exists.
- ☐ Attribution matches the source.
- ☐ Implied actions are labelled as such.
- ☐ Formal minutes and trackers remain authoritative where required.

ON YOUR OWN

- Review one recorded meeting you attended.
- Compare the output with the transcript and formal minutes.

In a line *A meeting summary is useful only when decisions, owners and dates remain traceable.*

CHAPTER 14

Copilot in Word

Outcome *Draft from evidence and focus review on material sections.*

IN BRIEF

Use Word to draft from approved sources, question a long document, or rewrite selected text. For consequential documents, Copilot is a triage and drafting aid, not a substitute for reading and approval.

Where to find it The Copilot icon on the Word Home ribbon (opens the Copilot pane), and the Copilot icon in the left margin on an empty line (opens Draft with Copilot).

WHY IT MATTERS AT LINKAGE

Executives use Word for board papers, procedures, reports, contracts and correspondence. Copilot can reduce starting and reading effort, but legal and financial effect still requires direct review.

HOW TO DO IT

- 1 Open the document and confirm the version.
- 2 To interrogate it, select the Copilot icon on the Home ribbon and ask in the pane, for example "list every obligation and deadline with section numbers".
- 3 To draft, go to an empty line, select the Copilot icon in the margin, and in Draft with Copilot use Reference your content, or type / to add an approved file.
- 4 To revise, select the text and choose Rewrite; keep the version with Keep it, or use Regenerate.
- 5 Read the cited sections in full and complete formal review before approval.

IN PRACTICE

A long treaty requires executive attention. Copilot identifies obligations, deadlines and ambiguous clauses with references. The executive reads those clauses in full and seeks specialist review where required.

COPY-READY PROMPT Interrogate a long document

Review this document for executive attention.

Provide: purpose; obligations affecting Linkage; deadlines; material financial terms; difficult or unusual provisions; ambiguities; questions before approval.

Give exact section or page references. Quote obligations, deadlines and financial terms rather than paraphrasing. State when the document itself is unclear.

CHECK BEFORE YOU RELY ON IT

- ☐ Correct version confirmed.
- ☐ Quoted wording matches the document.
- ☐ Material clauses were read in full.
- ☐ Specialist or legal review was obtained where required.

ON YOUR OWN

- Use a non-sensitive approved document.
- Verify three cited sections manually.

In a line *Let Copilot direct attention; do not let it replace direct reading of material provisions.*

CHAPTER 15

Copilot in Excel

Outcome *Explore data while maintaining calculation discipline.*

IN BRIEF

Copilot in Excel can suggest formulas, charts and insights. Results depend on workbook structure, data quality and business definitions. Important figures must be reproduced or reconciled before formal use.

Where to find it The Copilot icon on the Excel Home ribbon. Works best on data formatted as a table (Insert, Table, or Format as Table).

WHY IT MATTERS AT LINKAGE

Numbers carry authority and can influence pricing, claims, performance and reporting decisions. Any error is amplified when presented confidently.

HOW TO DO IT

- 1 Format the range as a table with clear headers and consistent data types.

- 2 Open Copilot from the Home ribbon and state the business measure precisely.
- 3 Ask for data-quality findings, such as duplicates and blanks, before any conclusion.
- 4 Require an explanation of the fields, formulas and assumptions behind each figure.
- 5 Reproduce or reconcile decision-relevant results before formal use.

IN PRACTICE

An executive explores broker concentration. Copilot identifies a pattern, but a duplicate row affects one result. Because the prompt requested data-quality checks and the executive reconciles the figures, the issue is corrected before presentation.

COPY-READY PROMPT Explore an insurance dataset

Analyse this dataset for [BUSINESS QUESTION].

First describe the fields, period, completeness and data-quality issues.

Then calculate [MEASURES] using these definitions: [DEFINITIONS].

Compare by [DIMENSION], identify trends, outliers and concentration, and state what the data cannot support me concluding.

For each figure, explain the fields, method and assumptions. Flag any result requiring manual reproduction.

CHECK BEFORE YOU RELY ON IT

- ☐ Workbook structure is suitable.
- ☐ Business definitions are explicit.
- ☐ Duplicates, blanks and inconsistencies were checked.
- ☐ Decision-relevant figures were reproduced.

ON YOUR OWN

- Use a dataset whose answers you partly know.
- Verify three results and document any difference.

In a line Use Copilot to explore and explain; verify the numbers before they become a record or decision input.

CHAPTER 16

Copilot in PowerPoint

Outcome Create and assess executive presentations from a sound source narrative.

IN BRIEF

Build from an approved source document where possible. Define the audience, purpose, decision and slide limits. Use Copilot to assess whether the deck communicates a coherent argument and answers likely questions.

Where to find it The Copilot icon on the PowerPoint Home ribbon, including "Create presentation from file" to build a deck from an approved Word source.

WHY IT MATTERS AT LINKAGE

Presentation automation is useful only when the underlying argument, evidence and decision are clear. Generic slide generation creates polished but weak material.

HOW TO DO IT

- 1 Write or select the approved source narrative, ideally a Word document.
- 2 From the Copilot pane, choose Create presentation from file and point to that source.
- 3 State the audience and the decision, and set a slide limit.
- 4 Review evidence, density and sequence, and cut overloaded slides.
- 5 Move detail into speaker notes, then ask Copilot to critique the deck as a sceptical executive.

IN PRACTICE

A board paper contains the complete reasoning for an underwriting authority change. Copilot converts it into a first-draft deck. The executive cuts text, verifies figures, and ensures the decision sought appears near the beginning.

COPY-READY PROMPT Source-led executive deck

Create an 8 to 10 slide presentation from [SOURCE].

Audience: [AUDIENCE]. Purpose: [DECISION / ALIGNMENT / UPDATE].

Slide 2 must state the recommendation or decision sought. Use one central message per slide. Include evidence, risks and mitigations, and finish with next steps or resolution. Add speaker notes. Do not invent facts or figures. Mark missing evidence [TO BE CONFIRMED].

CHECK BEFORE YOU RELY ON IT

- ☐ Argument matches the source.
- ☐ Decision is explicit.
- ☐ Figures and charts are verified.
- ☐ Slides are readable and not overloaded.

ON YOUR OWN

- Create a deck from an approved short paper.
- Ask Copilot to critique the result as a sceptical executive.

In a line *The source document carries the thinking; Copilot helps with structure and first-draft production.*

PART V

Extended Capabilities

Collaborative pages, deeper research, multi-step analysis, and the disciplined case for agents.

CHAPTER 17

Copilot Pages

Outcome *Know when to turn a useful response into collaborative working content.*

IN BRIEF

Copilot Pages is a persistent canvas for developing and sharing Copilot-assisted content. It suits collaborative working material; formal records should still follow Linkage document and retention processes.

Where to find it The "Edit in Pages" or Pages icon on a Copilot Chat response, which opens the shared Pages canvas beside the chat.

WHY IT MATTERS AT LINKAGE

Useful analysis can remain trapped in a private chat. A persistent collaborative surface lets colleagues improve, challenge and build on it.

HOW TO DO IT

- 1 Move a useful response into the available collaborative surface.
- 2 Add source references and unresolved questions.
- 3 Invite appropriate colleagues to contribute.
- 4 Resolve comments and verify facts.
- 5 Finalise formal outputs in the approved record format and location.

IN PRACTICE

An executive develops an agency-channel brief, then shares the working page with Claims and Finance colleagues. Their operational knowledge corrects assumptions before the formal paper is produced.

COPY-READY PROMPT **Develop a working brief**

Prepare a working brief on [TOPIC] with: current position; evidence; open questions; options; risks; proposed next step.
Cite factual claims and label inference.

Then add: people to consult; the question for each; unsupported assumptions; and evidence still required before a formal recommendation.

CHECK BEFORE YOU RELY ON IT

- ☐ The content is clearly labelled as working material.

- ☐ Sharing permissions are appropriate.
- ☐ Contributions are verified before formal use.
- ☐ The final record is stored correctly.

ON YOUR OWN

- Move one non-sensitive workshop output into a collaborative page where available.
- Ask a colleague to add what the source material could not contain.

In a line *Use collaborative surfaces for development, not as a substitute for formal records.*

CHAPTER 18

Researcher

Outcome *Recognise when a question requires deeper, cited research.*

IN BRIEF

Researcher is an advanced Microsoft 365 Copilot agent for deeper research workflows where enabled. It can produce structured, cited material, but source quality, date, jurisdiction and contradictions still require review.

Where to find it Under Agents in the Microsoft 365 Copilot app (pre-pinned), and in Copilot Chat under Tools. Note the model selector, the Sources button and the Web search toggle.

WHY IT MATTERS AT LINKAGE

Some executive questions require multiple sources, internal and external context, competing evidence, and a structured case for and against.

HOW TO DO IT

- 1 Open Researcher under Agents in the Microsoft 365 Copilot app.
- 2 State the strategic question and the decision it supports.
- 3 Set scope and sources: use the Sources button, and the Web search toggle for external context.
- 4 Ask for the strongest opposing case, and inspect the authority and date of each citation.
- 5 Add internal knowledge Researcher cannot see, and form the recommendation yourself.

IN PRACTICE

Linkage considers a digital distribution opportunity. Researcher assembles public market, regulatory and competitor evidence alongside available work context. The executive verifies sources and adds internal capability constraints that are not documented anywhere.

COPY-READY PROMPT **Commission a decision-ready study**

Research whether Linkage Assurance should [STRATEGIC QUESTION].

Produce: executive summary; market context; competition; regulatory considerations;

operating requirements; risks; strongest case against; evidence gaps.

Cite each source with date and jurisdiction. Where sources conflict, present both. Do not present another jurisdiction's guidance as Nigerian requirements. Clearly separate public evidence, organisational evidence and inference.

CHECK BEFORE YOU RELY ON IT

- ☐ Sources are authoritative enough for the claim.
- ☐ Dates and jurisdictions are visible.
- ☐ Conflicting evidence is not smoothed over.
- ☐ The final recommendation remains an executive decision.

ON YOUR OWN

- Choose one genuine research question.
- Verify at least three decisive sources before reuse.

In a line *Researcher accelerates evidence gathering; it does not remove source due diligence or executive judgement.*

CHAPTER 19

Analyst

Outcome *Understand how an advanced agent can support multi-step data exploration.*

IN BRIEF

Analyst is an advanced Copilot agent for data analysis where enabled. Use it to explore patterns, test hypotheses and show working. Treat findings as analytical leads until reconciled with approved data and definitions.

Where to find it Under Agents in the Microsoft 365 Copilot app, next to Researcher. Analyst runs Python on your data and shows its working; it has no web toggle.

WHY IT MATTERS AT LINKAGE

Portfolio and operational questions may require several analytical steps across files. Executives need both the result and a clear explanation of the method and limitations.

HOW TO DO IT

- 1 Open Analyst under Agents in the Microsoft 365 Copilot app.
- 2 State the business question and the competing explanations.
- 3 Attach the files and describe the fields and period.
- 4 Ask for a data-quality assessment first, then the calculations, assumptions and sensitivity.
- 5 Review the working it shows, and reconcile key findings before any decision.

IN PRACTICE

Motor performance has deteriorated. Analyst tests whether frequency, severity, pricing or mix explains the movement. The executive checks the fields and reconciles the material findings before discussing them formally.

COPY-READY PROMPT Test a portfolio hypothesis

Analyse [FILES] to test this business hypothesis: [HYPOTHESIS].

First assess completeness and quality. Then calculate [MEASURES] by [DIMENSIONS].

Test competing explanations: [LIST]. Quantify what each explains where the data supports it.

Show fields, formulas and assumptions. State what would disprove the hypothesis and what the data cannot distinguish.

Finish with three decision-relevant findings and three limitations.

CHECK BEFORE YOU RELY ON IT

- ☐ Data is approved and sufficiently complete.
- ☐ Business definitions are correct.
- ☐ Findings are not treated as causal unless supported.
- ☐ Key figures were reconciled.

ON YOUR OWN

- Use a small approved dataset with a known pattern.
- Ask what evidence would disprove your initial view.

In a line *Analyst is valuable for exploration and challenge; verified business data remains the basis for formal decisions.*

CHAPTER 20

Agents and the Agent Store

Outcome *Identify a sensible agent opportunity without building prematurely.*

IN BRIEF

Microsoft documents agents as extensions that connect to organisational knowledge and support questions, tasks and processes. Capability, sharing, metered use and controls depend on licence and admin settings. Day 1 introduces opportunity selection; full design and governance belong to Day 2.

Where to find it The Agent Store and Agent Builder in the Microsoft 365 Copilot app (agents flyout). Building and sharing depend on admin settings; Copilot Studio is the maker tool for advanced agents.

WHY IT MATTERS AT LINKAGE

Agents can package a recurring job, instructions and knowledge for repeated use. A poorly designed shared agent can scale error as easily as it scales efficiency.

HOW TO DO IT

- 1 Check whether a saved prompt already does the job.
- 2 Browse the Agent Store for an existing agent before building one.
- 3 To build a simple agent, open Agent Builder and define users, approved knowledge and exact boundaries.
- 4 State what the agent must never do.
- 5 Name an owner, a review process and a human verification requirement.
- 6 Confirm tenant controls and licensing with IT before building or sharing.

IN PRACTICE

A renewal-preparation task may justify an agent if several colleagues repeat it from approved sources. The agent should organise evidence and gaps, not set rates, approve renewals or invent missing figures.

COPY-READY PROMPT Agent opportunity assessment

Assess whether [RECURRING TASK] should use a saved prompt or an agent.

Consider: frequency, number of users, stable knowledge sources, need for repeatable structure, risk, required human judgement and governance.

Recommend one option. If agent, define: purpose; users; knowledge; output; prohibitions; verification; owner; review date; licence and admin dependencies.

CHECK BEFORE YOU RELY ON IT

- ☐ A saved prompt was considered first.
- ☐ Knowledge sources are approved and current.
- ☐ Prohibitions cover decisions, figures, clauses and commitments.
- ☐ Ownership and review are defined.
- ☐ IT and Compliance requirements are confirmed.

ON YOUR OWN

- Complete the Agent Opportunity Canvas in the workshop guide.
- Bring one candidate use case to Day 2.

In a line *Build an agent only when repetition, shared value and stable knowledge justify the governance overhead.*

PART VI

Sustaining Adoption

Turn one day of learning into one reliable habit, and arrive at Day 2 with evidence.

CHAPTER 21

The 30-Day Adoption Plan

Outcome *Turn Day 1 learning into one repeatable behaviour.*

IN BRIEF

Start with one use case, maintain a prompt library, verify outputs, and record whether preparation effort or quality improves. Expand only after the first habit is stable.

WHY IT MATTERS AT LINKAGE

Training value is realised through controlled repetition, not the number of features remembered.

HOW TO DO IT

- 1 Week 1: use one recurring task and save the best prompt.
- 2 Week 2: add Outlook or Teams communication support.
- 3 Week 3: use one approved Word, Excel or PowerPoint artefact.
- 4 Week 4: review results, share one safe pattern, and identify a Day 2 need.

IN PRACTICE

An executive begins with meeting preparation, tracks required revision, and after four weeks decides whether to extend into weekly updates or agent design.

COPY-READY PROMPT **Weekly reflection**

Review my use of Copilot this week based on the notes I provide.

Summarise: tasks attempted; outputs used; corrections repeated; verification performed; measurable change from baseline; risks or gaps; one improvement for next week.

Do not claim a productivity gain unless my notes contain a comparison.

CHECK BEFORE YOU RELY ON IT

- ☐ Claims of benefit are based on recorded evidence.
- ☐ Repeated corrections are added to the prompt.
- ☐ Risk has not increased as use expands.
- ☐ One behaviour is stable before adding more.

ON YOUR OWN

- Complete the action plan in the workshop guide.
- Review progress every Friday for four weeks.

In a line *Build one reliable habit, then widen responsibly.*

CHAPTER 22

Preparing for Day 2

Outcome *Consolidate Day 1 foundations and identify an advanced learning need.*

IN BRIEF

Day 1 covers Microsoft 365 Copilot foundations, prompting, applications, grounding and responsible use. Day 2 develops selected advanced workflows, and extends the same principles to Claude Projects and Gemini Notebook.

WHY IT MATTERS AT LINKAGE

Day 2 should build on proven use cases, not repeat product orientation. Participants should arrive with evidence of what worked, where risk remained, and what deserves deeper development.

HOW TO DO IT

- 1 Bring one tested prompt and its before-and-after outputs.
- 2 Bring one verified application use case.
- 3 Bring one agent or advanced workflow candidate.
- 4 List licence or policy questions for IT and Compliance.
- 5 State the Day 2 capability with the clearest business value.

IN PRACTICE

A participant arrives at Day 2 with a weekly briefing prompt, examples of recurring correction, and an agent idea for renewal preparation. The evidence guides practical design rather than hypothetical discussion.

COPY-READY PROMPT Day 2 readiness brief

Using the notes I provide, prepare a one-page Day 2 readiness brief with:

1. Day 1 use case tested
2. What worked
3. Repeated corrections or risks
4. Evidence of benefit, if available
5. Advanced capability to develop
6. Questions for IT, Compliance or the facilitator

Do not infer facts not present in my notes.

CHECK BEFORE YOU RELY ON IT

- ☐ Evidence from Day 1 is available.

- ☐ The advanced need is tied to a recurring task.
- ☐ Licence and governance questions are explicit.

ON YOUR OWN

- Complete the readiness brief before Day 2.
- Select one artefact to bring for guided practice.

In a line *Day 2 should deepen a proven business need, not add complexity for its own sake.*

PART VII

Tool Selection and Information Boundaries

Choose the right tool in seconds, and classify any document before it leaves Linkage.

CHAPTER 23

What Claude Is

Outcome *Distinguish an AI grounded in your organisation from one you ground yourself.*

Where to find it claude.ai or the Claude desktop app. Until you build a Project, set your context at the start of each new chat.

THE GOVERNING RULE FOR DAY 2

Neither Claude nor Gemini Notebook sits inside Linkage's Microsoft 365 compliance boundary. On individual accounts there is no administrator, no audit log and no retention control.

You are the only control. Apply Chapter 25 before every upload.

IN BRIEF

Claude is not connected automatically to Linkage Assurance information. Its value in this programme is structured reasoning, drafting and production using information you deliberately provide.

	Microsoft 365 Copilot	Claude
Knows Linkage	Automatically, within your permissions	Only what you give it
Strongest at	Retrieval and recall	Reasoning, drafting, production
Ask it	"What happened on the fleet account?"	"Draft the procedure note from this framework"
Persistence	Chats, standing instructions	Five Projects with instructions and knowledge
Linkage oversight	Purview, audit, eDiscovery	None on individual accounts

Microsoft 365 Copilot is designed to work with permitted organisational context. Claude works from the instructions and materials supplied for the task.

OPEN EVERY CONVERSATION WITH CONTEXT

Until you build Projects (Chapter 26), begin each session by stating your role, your company, and three standing rules: formal British English; under 400 words unless specified; and never invent a figure, clause or regulatory requirement. Then add: "You have no access to our systems. Ask me for what you need rather than assuming."

IN PRACTICE

An executive asks Claude what was agreed at last month’s treaty meeting. It cannot know. She then uploads the treaty and asks for a procedure note explaining how the new retention limits change what underwriters may bind without referral, with worked examples at three sums insured. Nine pages, structured, in minutes: a document that would otherwise take two days and be postponed for a month. Copilot answers what happened. Claude builds what comes next.

CHECK BEFORE YOU RELY ON IT

- ☐ Every paste is a disclosure decision.
- ☐ On an individual account, nobody at Linkage can see or reverse it.

CHAPTER 24

Selecting the Tool

Outcome Choose correctly in seconds, and stop running tasks twice.

Where to find it A decision, not a screen: Copilot in Microsoft 365, Claude at claude.ai, NotebookLM at notebooklm.google.com.

IN BRIEF

Three questions settle almost every case. Is the answer already in Linkage’s Microsoft 365? Use Copilot. Am I building or reasoning? Use Claude. Do I have documents I must master and communicate? Use Notebook.

Task	Copilot	Claude	Notebook
What did the broker say last month?	Yes		
Draft our AI acceptable-use policy	Partly	Yes	
Summarise this 80-page treaty with citations	Partly	Partly	Yes
Produce a formatted Word procedure note	Partly	Yes	
Turn this into a podcast for agents			Yes
Build a quiz to test staff understanding		Partly	Yes

Gemini Notebook is used when source traceability and document mastery are central. Claude Projects is used when the primary requirement is structured production from a defined instruction set and knowledge base.

IN PRACTICE

A NAICOM circular arrives with a 30-day response window. Copilot answers what Linkage has already committed to NAICOM in the last twelve months, because only Copilot can reach that. Notebook establishes what the circular actually requires, paragraph by paragraph, without straying beyond the document. Claude drafts the revised policy, the implementation plan and the board paper.

Retrieve, establish, build. Using Claude for step two risks confident, unsourced statements.

CHECK BEFORE YOU RELY ON IT

- ☐ Claude answers retrieval questions fluently and sometimes wrongly.
- ☐ If the answer must be defensible, ground it.

CHAPTER 25

The Boundary Rule

Outcome *Classify any document in seconds, and know how to proceed when the answer is no.*

IN BRIEF

Under the Nigeria Data Protection Act 2023 you remain the data controller regardless of which tool you paste into. NAICOM will not accept "the training said we could". Three tiers decide what may leave Linkage.

Tier	Covers	Action
Green	Public documents, circulars, published accounts, market reports, anonymised templates	Upload freely. Most of today.
Amber	Internal documents with client names, premiums, terms, staff names	Redact identifiers. The substance survives.
Red	Policyholder data, medical information, bank details, BVN, HR records, privileged material	Never upload. Use the Copilot Work tab.

SAFE HANDLING WHEN THE ANSWER IS NO

- 1 Abstract. Describe the situation without identifiers, for example "a bodily injury claim notified on day 63 against a 30-day condition".
- 2 Substitute. Dummy names and figures work identically for designing a method.
- 3 Split. Build the template in Claude; apply it to real data inside Linkage systems.

COPY-READY PROMPT **Classify before uploading**

I am considering uploading a document to a third-party AI tool outside my company's systems. I work at Linkage Assurance Plc, a Nigerian general insurer regulated by NAICOM

and subject to the Nigeria Data Protection Act 2023.

The document is: [DESCRIBE: what it is, what it contains, who produced it].

Tell me:

1. Whether it likely contains personal data under the NDPA 2023, and which elements.
2. Whether it contains commercially sensitive information.
3. Classification: GREEN, AMBER or RED.
4. If AMBER: exactly what to redact, field by field, so it still supports my task.
5. If RED: how to restructure my request to get the benefit without uploading it.

Be conservative. If unsure, classify higher and tell me to consult Compliance.
Under 350 words. British English.

IN PRACTICE

A claims manager wants a better decision-letter template. Uploading twenty real letters is a Red-tier disclosure. She takes four, replaces names with "Mr A", policy numbers with POL-000000, figures with dummies, and the medical narrative with "[nature of injury described]". Four minutes. Claude sees the structure, tone and weaknesses, which is all it needed.

The AI needs the shape of your data, not the data.

CHECK BEFORE YOU RELY ON IT

- ☐ Redaction means deletion.
- ☐ Black highlighting, hidden columns and cropped images all retain the underlying content in the file.

Reusable Production Workspaces

The one Claude capability worth mastering: five Projects, instructed, tested and handed over.

CHAPTER 26

Choosing Your Five

Outcome *Decide which five contexts deserve a permanent workspace.*

Where to find it Projects in the Claude sidebar; New project at the top right.

IN BRIEF

A Project is a persistent workspace with standing instructions and an uploaded knowledge base. Without one, you explain your role, your company and your standards on every conversation: two minutes, twenty times a week, consuming your allowance before you have asked anything.

HOW TO CREATE ONE

- 1 Open Projects in the Claude sidebar and select New project.
- 2 Complete the Create a project modal: what you are working on, and what you are trying to achieve. Claude does not see the name.
- 3 Set the Custom instructions (Chapter 27).
- 4 Add documents to the Files panel (Chapter 28).
- 5 Start a scoped chat inside the Project.

TWO QUIRKS WORTH KNOWING

Chats inside a Project do not share context with each other. Only instructions and knowledge are shared, so anything permanent must be written into one of them.

The name and description are invisible to Claude. Instructions go in the instructions field.

A sensible five	Knowledge base
Underwriting Reference	Anonymised wordings, underwriting guide, authority matrix
Committee and Board Papers	Two exemplar papers in house format
Regulatory Watch	Current NAICOM circulars, internal compliance policy
Correspondence	Tone, standing positions, prohibitions in instructions
Internal Communications	House style exemplars

COPY-READY PROMPT **Select your five Projects**

I am [ROLE] at Linkage Assurance Plc, a Nigerian general insurer. My Claude plan allows five Projects: persistent workspaces with standing instructions and an uploaded knowledge

base.

My recurring work: [AREA 1] [AREA 2] [AREA 3] [AREA 4] [AREA 5] [AREA 6]

Tell me:

1. Which five justify a Project, ranked by time saved. One sentence each.
2. Which areas should be combined, and what the combined Project is called.
3. Which does not justify one, and why a chat is enough.
4. For each of the five: exact name, documents for the knowledge base, and the single most important prohibition its instructions must carry given NAICOM regulation.
5. Which to build first, and why.

Flag any document likely to contain personal data. British English. Practical.

IN PRACTICE

A technical manager used Claude eight times a week for wording queries. Each time she explained the company, pasted the wording, and described the house approach: four minutes of setup. She built one Project. Now she opens it and asks the question, and the answer quotes the clause with its number because the instructions demand it. Four minutes times eight times fifty-two is roughly 28 hours a year, from a thirty-minute build.

CHECK BEFORE YOU RELY ON IT

- ☐ Do not build all five today.
- ☐ A slot spent on an abandoned Project is one you cannot use for something better.

CHAPTER 27

Writing Instructions

Outcome *Write instructions that change behaviour reliably, not a description that changes nothing.*

Where to find it The Custom instructions field inside a Project.

IN BRIEF

Good instructions are built from five blocks. The Prohibitions block is the one that matters most in a regulated business.

Block	Contains
Role	Who Claude is being, and who you are. Insurance, Nigeria, specific.
Purpose	What this is for, and what it is not for.
Method	Structure, sourcing, and what to do when uncertain.
Style	British English, register, default length, formatting.
Prohibitions	What it must never do. In a regulated business, the block that matters.

The prompt below is the model. Adapt the role, purpose and prohibitions for each of your five; the structure holds for all of them.

COPY-READY PROMPT Project instructions, the model

ROLE

Technical underwriting reference assistant for Linkage Assurance Plc, a general insurance company in Nigeria regulated by NAICOM.

PURPOSE

Answer questions on coverage, exclusions, conditions and definitions from the wordings in this project's knowledge base. You do not make underwriting or claims decisions; those belong to an authorised person.

METHOD

- Quote the governing clause verbatim with its number, then explain it.
- Cite every clause that bears on the question, not just the first.
- Where wording is ambiguous: say so, give both readings, refer to a senior underwriter.
- Where the answer depends on facts I have not given, ask.
- End every substantive answer: "Verify against the current signed wording before relying on this."

STYLE

Formal British English. Under 400 words. Answer first, then clause, then explanation.

PROHIBITIONS, absolute

- Never quote, paraphrase or refer to a clause not in this knowledge base. If it is not there: "not found in the wordings available to me".
- Never state a premium, rate, limit, sub-limit or deductible not in an uploaded document.
- Never advise whether to accept, decline, settle or repudiate.
- Never cite a NAICOM requirement or statute unless it appears in the uploaded material.
- Never soften an exclusion because it produces an inconvenient answer.

IN PRACTICE

A well-built Project answered a question about a marine cargo exclusion that was not in its knowledge base: fluently, plausibly, from general market knowledge. The instructions said what to do. They never said what not to do. One line fixed it: "Never refer to a clause that does not appear in this knowledge base. If it is not there, say not found in the wordings available to me."

Prohibitions are the block that makes a Project safe.

CHECK BEFORE YOU RELY ON IT

- ☐ An untested prohibition is an assumption, not a control.
- ☐ Try to break it (Chapter 30).

The Knowledge Base

Outcome *Load the right material, keep it lean, and know what to exclude.*

Where to find it The Files panel inside a Project; use the plus to add sources.

THE FREE-ACCOUNT CONSTRAINT

Paid plans expand knowledge capacity automatically as a base grows. Free accounts do not: your knowledge base competes with your conversation for the same context, and is re-read on every message.

Keep to three to five focused documents per Project. Larger source sets belong in Notebook, which holds fifty.

Include	Exclude
Reference material you return to	Anything Red-tier
One or two exemplars of house standard	Superseded versions, treated as equally authoritative
Definitions and internal terminology	Documents you cannot vouch for
Current approved versions only	Anything "just in case"

MAINTENANCE

Ask the Project to review its own knowledge base: what each source is and its date; whether any two contradict; whether any is superseded or incomplete; whether any contains personal data, listed by location; and which document does the least work. The fourth question is the one that matters.

IN PRACTICE

A revised underwriting guide was uploaded while still under review. The approved version stayed. For six weeks the Project answered from both: some answers carried approved authority limits, some carried proposed ones. Nothing was flagged, because both looked equally authoritative. Two referrals went to the wrong level.

A knowledge base holds the current approved version only.

CHECK BEFORE YOU RELY ON IT

- ☐ Uploaded documents persist until removed, and no administrator will ever notice.
- ☐ Diarise a quarterly review.

From Question to Deliverable

Outcome *Produce real Word, Excel and PowerPoint files, not text you rebuild.*

Where to find it A Project chat, with "Upgraded file creation and analysis" enabled under Settings, Features.

IN BRIEF

A Project that only produces chat text has done half a job. Copying out, reformatting and rebuilding the table is where the saving disappears. With file creation enabled, the trigger is simply asking: "Deliver this as a Word document I can download."

HOW TO DO IT

- 1 Enable "Upgraded file creation and analysis" under Settings, Features, once.
- 2 Open the Project, never a blank chat, and start a new conversation for the task.
- 3 Go straight to substance; the Custom instructions are already applied.
- 4 Refine in place, in two or three exchanges.
- 5 Ask for the format: "Deliver this as a Word document I can download."
- 6 Download the file, or save it to Google Drive, and verify before it leaves your desk.

COPY-READY PROMPT Formatted procedure document

Using this project's knowledge base, draft an internal procedure note on [SUBJECT] for Linkage Assurance Plc.

AUDIENCE: [WHO USES THIS DAILY]. They [ARE / ARE NOT] technical specialists.

STRUCTURE

1. Document control: reference, version, owner, approval date, review date
2. Purpose, three sentences
3. Scope: who and what it applies to, and what it excludes
4. Definitions
5. [MAIN SECTIONS]
6. Roles and responsibilities, as a table
7. Escalation
8. Version history

RULES

- Use only this knowledge base. Introduce no requirement, figure or regulatory obligation that is not there.
 - Where the sources are silent, insert [TO BE CONFIRMED] and list every instance at the end.
 - Number every section so staff can cite them (3.2.1).
 - Short paragraphs. Usable by staff, not admired by lawyers.
 - Formal British English. Approximately [N] pages.
- Deliver as a Word document I can download.

ADAPTING THE FORMAT

For a deck: same structure, but specify 10 to 12 slides, the recommendation on slide 2, five bullets maximum per slide, figures in tables, and speaker notes carrying the detail kept off the slide. Then ask it

to review the result as a sceptical committee member. For a workbook: specify your columns, which need data validation, and the rule that a calculated field displays "Insufficient data" rather than an error where an input is missing. Populate with illustrative dummy data, never real client data.

IN PRACTICE

Linkage revises its underwriting authority framework. Historically: four documents, three authors, three weeks, subtly different versions of the truth. Instead, build the procedure document first, inside the Project, as a real Word file. Verify it. Then generate the board paper, the briefing deck and the one-page aide from it. All four inherit the house register and the prohibitions automatically, and all four agree by construction.

Build the authoritative document once. Generate every other format from it.

CHECK BEFORE YOU RELY ON IT

- ☐ Generated files carry no Linkage letterhead or template.
- ☐ For anything leaving the building, produce content in Claude and place it in the official template.

CHAPTER 30

Testing Your Project

Outcome *Prove it behaves before you rely on it.*

Where to find it Inside the Project, as ordinary chats. Run the tests before operational use.

IN BRIEF

A Project should be tested before operational use. Testing covers grounding, refusal behaviour, required format and prohibited actions.

Test	Checking
Grounding	Does it answer from the knowledge base and cite what it used?
Refusal	Does it decline when the answer is not there? The test that matters.
Format	Does it follow house structure and length unprompted?
Boundary	Does it refuse to decide, or to state unverified figures?

COPY-READY PROMPT **Project test protocol**

I have built this Claude Project for Linkage Assurance Plc, a NAICOM-regulated Nigerian general insurer. Before I rely on it, produce a test protocol.

1. FOUR GROUNDING TESTS: questions it should answer well from its knowledge base. State what a good answer must contain, including whether it must quote a source.

2. SIX REFUSAL TESTS, the section that matters. Six questions designed to make it answer from general knowledge instead: a document it does not hold; a regulatory requirement not in its sources; a figure it has not been given; a decision it should not make; a question phrased to pressure it into being helpful rather than correct; and a plausible-sounding question about something that does not exist. For each, state exactly what PASS and FAIL look like.

3. THREE FORMAT TESTS: does it follow house structure, register and length without reminder?

4. What I should check that a casual reviewer would miss.

5. A quarterly maintenance checklist.

Be adversarial. Assume I will be busy and inclined to trust it.

IN PRACTICE

Refusal test six: a plausible question about something that does not exist. She asked whether the standard fire wording contained a "progressive deterioration exclusion", a real market concept absent from her document. The Project answered confidently, describing what such an exclusion typically covers and how it would apply. Reasonable market practice. Not in her wording. She would never have asked it herself, because she knows the document. Her competence concealed the failure.

Test the questions you would never ask. Those are the ones a colleague will ask.

CHAPTER 31

Portability

Outcome *Make your work survive your account.*

Where to find it The Custom instructions field (copy it out) and SharePoint for the source documents.

IN BRIEF

Where Project sharing is unavailable, continuity depends on documented instructions, approved source locations, and a formal handover stored in Linkage-controlled systems.

- Export the instructions. A colleague rebuilds in two minutes.
- Store knowledge base sources in SharePoint. The documents are the asset.
- Write the handover before you need it.
- Anything the department depends on stays in Microsoft 365, where Linkage controls it.

COPY-READY PROMPT Project handover

Hand this project's setup to a colleague at Linkage Assurance Plc who uses Claude on their own free account. Projects cannot be shared, so they must rebuild it.

Produce a handover document containing:

1. One paragraph: what this project is for and who should use it.
2. The complete instructions, formatted for copying straight into a new project.
3. Every knowledge base document, where the current version lives in SharePoint, and

whether it needs redaction first.

4. Five example questions demonstrating what it does well.

5. Three things it must never be used for.

6. What they must verify before relying on any answer.

7. A "last reviewed" line and the person responsible for keeping this current.

Written for someone who was not at this workshop. Deliver as a Word document I can download. Under 600 words.

IN PRACTICE

Two colleagues wanted the same Project. Sharing was not available, and handing over a login was not the answer. She produced a two-page handover: instructions ready to copy, source documents with SharePoint locations and redaction notes, and the prohibitions. Both rebuilt in under ten minutes. The unexpected benefit: it now lives in SharePoint, survives her leave, and is visible to her Head of Department.

On an individual plan, that handover document is the only governance artefact that exists.

WHEN TO MAKE THE CASE FOR PAID

Free is sufficient for individual productivity. Escalate when several people need the same Project, when knowledge bases outgrow the free ceiling, when limits interrupt real work, or when Linkage wants administrative visibility of what staff upload.

The last is the strongest argument, and it belongs with IT and Compliance rather than Finance.

PART IX

Grounded Source Work

Build, interrogate, map and share Gemini notebooks, where every answer carries a citation.

CHAPTER 32

What Notebook Is For

Outcome *Recognise where grounded beats general.*

Where to find it notebooklm.google.com. Create a notebook, then add sources.

IN BRIEF

Gemini Notebook suits a fixed collection of sources that must be understood, questioned and communicated with traceable citations. Citation review remains necessary before any conclusion is used.

Use Notebook when	Use Claude when
The answer must be traceable	You are creating something new
A fixed body of material to master	Reasoning beyond the documents
Up to fifty sources	You need a real Word, Excel or PowerPoint file
You must explain it in several formats	You need a working calculator or deliverable
Defensibility matters	Production speed matters

FIVE WORTH BUILDING

- Regulatory: circulars and guidelines. What changed, what applies, what the deadline is.
- Treaty: the reinsurance programme. How it responds, what is excluded, what must be notified.
- Product: wordings for one class, so anyone can establish cover without interpreting from memory.
- Tender: a document set you cannot afford to misread.
- Onboarding: what a new joiner must absorb, interrogable at their own pace.

COPY-READY PROMPT Interrogate a regulatory document

I work at Linkage Assurance Plc, a Nigerian general insurer regulated by NAICOM.

Working strictly from the uploaded sources and citing the paragraph for every point:

1. What this document requires, as discrete numbered obligations. One per item, do not bundle.
2. For each: who would be responsible, what evidence of compliance looks like, and the deadline if stated.
3. What has changed from any previous position the document itself describes. If it describes none, say so rather than inferring.
4. Every deadline, date and transitional period, chronologically.
5. Every stated consequence of non-compliance.

6. Any provision capable of more than one reading. Quote it; give both readings.
7. Anything mentioned but not defined, which we would need clarified.

Quote exact wording for anything material. Never paraphrase an obligation, deadline or penalty. Where the sources are silent: "not addressed in the uploaded sources".

IN PRACTICE

A circular read by three people produced three different views, and a meeting was scheduled to resolve it. Uploaded with two preceding circulars and the internal policy, the interrogation returned fourteen discrete obligations, each cited. Two of the three readings were partly wrong: each reader had anchored on their own function and read the rest lightly. The item nobody had noticed was a transitional provision shortening one deadline by 45 days.

It reads page sixty with the same attention as page one.

CHECK BEFORE YOU RELY ON IT

- ☐ A citation protects you only if you click it.
- ☐ An uncited claim about a regulatory obligation should not leave your desk.

CHAPTER 33

Building a Notebook

Outcome *A source set that produces reliable answers, within the limits.*

Where to find it The Sources panel on the left of a notebook; Add, then choose the type. A green check means a source is indexed.

IN BRIEF

Notebook accepts PDFs, websites, YouTube, audio, Google Docs and Slides, EPUB and pasted text, with understanding across all of them.

THE FOUR LIMITS THAT SHAPE HOW YOU BUILD

50 sources per notebook. A PDF, a URL, a video or a pasted block each counts as one.

500,000 words or 200MB per source. Identical on every plan; upgrading does not raise it, and large scanned documents may need splitting.

50 chat questions per day. Enough for real work, not for browsing.

Copy-protected PDFs will not import at all. If a file refuses, request an unprotected copy.

HOW TO DO IT

- 1** Add sources in the Sources panel: choose Add, then the type (PDF, Google Doc, URL, audio, or pasted text). A green check means a source is ready.

- 2 Current versions only. If a superseded version must be included, say so in its title.
- 3 Use complete documents, not extracts; you have the capacity.
- 4 One subject per notebook. You have a hundred available; three answer better than one.
- 5 Redact first. Chapter 25 applies to every source.
- 6 Record what is in it, because six weeks later nobody remembers.

THE HABIT THAT IMPROVES EVERYTHING DOWNSTREAM

Interrogate in chat before generating anything in the Studio. Establish what the material says, correct misreadings, and settle your framing.

With Audio Overviews limited to roughly three a day, you cannot afford to generate speculatively.

IN PRACTICE

Both the 2025 wording and the 2026 revision were uploaded, reasonably, since there was capacity. Asked whether a peril was excluded, the answer said yes, with a genuine citation and an accurate quotation, from the 2025 wording, which no longer applies. Everyone checked the citation. Nobody checked which document it pointed to.

A citation proves a passage exists. Not that it is current.

CHECK BEFORE YOU RELY ON IT

- ☐ Whether your data stays in an organisational boundary depends on the account.
- ☐ Confirm Workspace or personal before uploading anything beyond Green-tier.

CHAPTER 34

Asking Well

Outcome *Get precise sourced answers, not competent summaries, within fifty questions a day.*

Where to find it The chat box in the centre of a notebook; click any citation number to jump to the source.

IN BRIEF

Four question types do most of the work. Each forces citation or surfaces something a summary would hide.

Question type	Use
Locate	"Where is [X] addressed, and what exactly does it say?" Forces citation over paraphrase.
Reconcile	"Do any sources disagree about [X]? Quote both." Surfaces contradictions early.
Absence	"What does this NOT address that I would expect?" No summary will ever tell you.

Question type	Use
Application	"Applying only these sources, what is the position if [SCENARIO]?"

COPY-READY PROMPT The four-question sequence

Answer each fully before moving on.

1 LOCATE

Where in these sources is [TOPIC] addressed? For each: the source, the paragraph, and the exact wording. Quote, do not paraphrase or summarise.

2 RECONCILE

Do any sources say different things about [TOPIC]? Quote each passage in full, identify its source, and say whether the difference is a genuine conflict, a change over time, or the same point expressed differently. If none, say so plainly.

3 ABSENCE

What would I reasonably expect a document of this kind to address that these sources do not? Explain why each absence matters for a general insurer in Nigeria.

4 APPLICATION

Applying only these sources, what is the position in this scenario: [REALISTIC SITUATION, illustrative details, not a real client or claim]. Cite the provision governing each element. Where the sources do not determine the outcome, say so and identify what additional authority would be needed.

IN PRACTICE

Sixty pages of tender document, uploaded. The obvious questions, requirements, deadlines and evaluation criteria, all answered well. Then question three: the document specified cover and evaluation weighting but never stated claims-handling service standards, unusual for a programme that size. Linkage submitted a clarification before the deadline, confirmed service standards would be assessed, and addressed them explicitly. Two competitors, working from the document as written, did not.

Thirty seconds. Regularly the most valuable question of the week.

CHECK BEFORE YOU RELY ON IT

- ☐ Fifty questions a day is generous until twenty go on vague follow-ups.
- ☐ One specific question is worth five exploratory ones.

Mind Maps

Outcome *Orient in unfamiliar material in seconds, and spot what is missing.*

Where to find it The Mind Map tile at the top of the Studio panel, on the right. Desktop browser only.

IN BRIEF

Select the Mind Map tile in the Studio panel. It draws a branching diagram: central topic, themes, sub-topics, examples. Zoom, expand and collapse, and click any node to open a grounded question on that topic in chat.

Use for	Do not use for
Orientation in an unfamiliar treaty or bundle	Deep analysis; it shows structure, not argument
Seeing clusters across thirty or forty documents	Comparison; the reconcile question does that better
Identifying gaps: the theme that is not there	Anything dynamic; it does not update as you ask

Capped at roughly ten a day, and not available on mobile. Rather than accepting a general overview, ask for the map to be framed around obligations, timeline, risk or coverage. A framed map is far more useful than a descriptive one.

IN PRACTICE

Nine treaty documents, mapped by coverage. Substantial branches for property perils, business interruption, exclusions and conditions precedent, all expected. No branch for claims notification and reporting obligations. She clicked into the sparse area. The provisions existed, but were brief, scattered across two documents, and considerably less specific than the expiring treaty. A negotiation point before signature, rather than a dispute after a loss.

Read the thin branches.

CHECK BEFORE YOU RELY ON IT

- ☐ A Mind Map is a summary of a summary.
- ☐ Use it to decide where to look, then verify in the source. Never quote it as authority.

Shared Notebooks

Outcome *Turn a personal notebook into institutional memory, governed properly.*

Where to find it The Share button at the top right of a notebook; set each person as Viewer or Editor.

IN BRIEF

Notebooks share with other Google accounts at two levels: viewer (read, question, see outputs) and editor (add sources, generate, modify). Sharing is per notebook: there is no team library, and each

carries its own access list. Capability varies by tier and account type, and enterprise and personal notebooks cannot be shared with each other.

Control	Action
Viewer by default	Editor rights to the owner and one deputy only. An editor adds a source and it becomes authoritative for everyone.
Named owner	One person accountable, not a department.
Quarterly review	Sources are superseded; nobody notices unless someone looks.
Source register	What is in it and which version, held outside the notebook.
Audit before sharing	Every viewer sees every source. Check for personal data first.

THREE WORTH BUILDING

- Onboarding: core reference material. A new joiner gets viewer access on day one and asks their own questions.
- Regulatory reference: shared read-only across compliance, underwriting and claims. One interpretation because one source set.
- One decision: a market entry, a product launch, a treaty renewal. Stakeholders ask their own questions rather than trusting a summary.

IN PRACTICE

A new underwriter's first fortnight: reading a folder in no particular order, interrupting two senior colleagues a dozen times a day with questions that had documented answers. Twelve sources in one notebook, viewer access on day one. Every answer cites the document and paragraph, so she learns where things live, which is the part that usually takes months. Interruptions dropped to two or three a day, and those were about judgement rather than fact. The pre-share audit caught one document containing a named client's terms that had no business in an onboarding pack.

CHECK BEFORE YOU RELY ON IT

- ☐ Sharing is per notebook. A colleague who leaves must be removed from each one individually.
- ☐ Keep a single list, because nobody else is tracking it.

Multi-Format Communication and Integration

Reach every audience from one verified source set, and combine the three tools into one workflow.

CHAPTER 37

Reports

THE GOVERNING RULE FOR THE STUDIO

Every Studio output inherits your sources and your framing. Generate from a notebook you have interrogated, never from raw uploads.

An infographic sent to your agency network carries Linkage's name. It is a published document, whatever produced it.

Outcome *One source set, three audiences, no contradiction.*

Where to find it The Reports tile in the Studio panel, on the right of a notebook.

IN BRIEF

The Board needs implications and a decision. Underwriters need specifics. Agents need plain language. Three separately written documents create three chances to diverge. You can also convert a chat conversation directly into a report, which is better than generating cold.

COPY-READY PROMPT Three audiences, one source set

1 BOARD

Report on [SUBJECT] for the Board of Linkage Assurance Plc. Experienced, not all insurance technicians. They need implications and a decision, not detail. Structure: position in one paragraph; what it means for Linkage; decision required; risks of acting and of not acting; recommendation. 800 words. Explain technical terms on first use. Cite every factual claim.

2 OPERATIONAL TEAM

Same subject, for the staff who implement it. Technically competent; they need to know exactly what changes. Structure: what changes; what each role does differently, as a table; deadlines; exceptions and edge cases; who to ask when the guidance does not fit. 1,000 words. Cite the source paragraph for every requirement.

3 AGENCY NETWORK

Same subject, for agents who are not technically trained and must explain it to clients. Structure: what changed, in plain language; what it means for their clients; the three questions clients will ask and how to answer each; what agents must not say. 500 words. No jargon. Short sentences. Concrete examples.

All three: strictly from the uploaded sources. Where they are silent, write [TO BE CONFIRMED] and list every instance at the end.

IN PRACTICE

A regulatory change affecting point-of-sale documentation, for Board, compliance, underwriters and the agency network. Historically four documents, three authors, two weeks, subtly different. Instead: one notebook, interrogated until requirements were verified, then three reports, each with its own audience specification. They cannot contradict each other because they derive from one source. She rewrote the agents' "what not to say" section herself, because she knew which explanation agents habitually get wrong and the circular did not.

Generate the derivatives. Keep your judgement in the version carrying the most risk.

CHAPTER 38

Infographics and Decks

Outcome *The formats that actually reach your organisation.*

Where to find it The Studio panel: the Infographic and Slide Deck outputs. Decks export as PPTX.

IN BRIEF

Ten infographic styles are available. For Linkage: Professional, Editorial, Instructional, Bento Grid. Decks can be revised slide by slide rather than regenerated, and export as PPTX for placing into Linkage templates.

HOW TO DO IT

For an infographic: name the audience, the style, and the stages in sequence, what happens, what the client should expect, and the timeframe at each. Require every figure to come from the sources and no service standard to be invented. Then ask which element was hardest to convey visually, and whether the graphic genuinely conveyed it or merely referred to it. For a deck: 12 to 15 slides, one idea per slide, five bullets maximum, figures in tables, a before-and-after slide, two worked examples. Then run four tests: is any slide too dense to read from the back; does any figure appear that is not in the sources; is any term used undefined; and does it answer "what do I do differently on Monday morning". Revise only the slides that fail.

IN PRACTICE

An infographic on claims documentation, produced in a playful style to feel engaging. Content accurate and clear. Two agency principals asked whether it was an official Linkage communication. One forwarded it to a client, who queried whether their insurer was taking the requirement seriously. Reissued in Professional style with contact details. No further questions.

Choose the style for the audience's relationship with you. Playful styles belong inside the building.

CHECK BEFORE YOU RELY ON IT

- ☐ A wrong service standard pinned above forty desks is a commitment Linkage will be held to.
- ☐ It outlives the correction.

CHAPTER 39

Video Overviews

Outcome *Reach people who will not read a document.*

Where to find it The Video Overview tile at the top of the Studio panel; a Cinematic format is available.

IN BRIEF

Narrated slides, pulling images, diagrams, quotes and figures from your documents. Strong for explaining data and demonstrating process. A Cinematic format exists for complex narrative; use standard narrated slides for operational briefings. Forty agents across several states can be reached in two days rather than a month, and the video is replayable in week six, when they have forgotten.

HOW TO DO IT

State the audience and their conditions: watching on a phone, on limited data, once. State the outcome they must be capable of by the end. Cover what is changing, exactly what they do differently, one complete worked example, the three most common mistakes, and who to contact. Omit regulatory background and anything they cannot act on. Around five minutes; longer will not be finished. Then ask three questions before distributing: what could an agent reasonably misunderstand; where do visual and narration duplicate rather than complement; and what should accompany it as a written one-pager.

IN PRACTICE

Before distribution, she asked what an agent could reasonably misunderstand. One step was described in the sources using an internal term agents do not use, and the video had reproduced it faithfully. One line of framing added to the accompanying one-pager. Two minutes.

Consistency is the underrated win. Forty agents receiving the same explanation beats forty receiving a live session of variable quality.

CHECK BEFORE YOU RELY ON IT

- ☐ A video to your agency network is a Linkage communication.
- ☐ An error is repeated to every client that agent speaks to, and cannot be corrected by reply.

CHAPTER 40

Audio Overviews

Outcome *Reach people in hours, when reading is impossible.*

Where to find it The Audio Overview tile at the top of the Studio panel; formats include Deep Dive and The Brief.

IN BRIEF

For Lagos traffic, agents between appointments, and managers travelling to branches. You can generate several in one notebook: different languages, or different subsections.

ROUGHLY THREE A DAY

There is no visible counter. You discover the limit by hitting it.

Interrogate first, settle the framing in chat, specify properly, and generate once. If you need audio across several topics, start days before you need it.

Works for	Does not work for
Regulatory briefings absorbed en route	Precise figures; listeners cannot note them
Onboarding in the first week	Exact wording
Technical explainers for non-specialists	Anything requiring a decision
Board pre-reading for directors who travel	Anything a listener must verify

HOW TO DO IT

Name the audience and their listening conditions. Set the goal at the level of taking part in a discussion, not implementing. Cover what this is, why it matters to Linkage specifically, the two or three operational implications, and the open questions. Omit procedural detail and precise figures. Around twelve minutes. Then ask what was stated as settled that is actually uncertain, and which figure a listener might misremember; that figure belongs in a written note instead.

IN PRACTICE

A dozen managers needed the shape of a renewed reinsurance programme. None would read eighty pages, and the briefing was cancelled twice. Twelve minutes of audio, aimed at non-specialists. The review step flagged a retention figure listeners might half-remember and misquote, which was removed from the audio and placed in a one-page note. Eleven of twelve had listened within a week, mostly while driving.

Audio for shape and meaning. Paper for figures.

CHECK BEFORE YOU RELY ON IT

- ☐ A listener cannot click a citation while driving.
- ☐ Never make audio the sole channel for anything that must be complied with precisely.

Assessment

Outcome *Find out whether the message landed.*

Where to find it The Studio panel: the Quiz, Flashcards and Data Table outputs.

IN BRIEF

Quizzes, flashcards and data tables support knowledge reinforcement and assessment. In regulated training, verified comprehension provides stronger evidence than attendance alone.

Format	Use at Linkage
Quiz	After a compliance or product briefing. Reveals which point failed, not just who attended.
Flashcards	Product knowledge and internal terminology. Agents self-test on a phone.
Data table	Extract comparable fields across twenty policy documents: limits, exclusions, conditions, side by side.

COPY-READY PROMPT **Product knowledge quiz**

Create a quiz from the uploaded sources.

AUDIENCE: Linkage agents who sell [PRODUCT / CLASS]. Not technically trained. They have just completed a briefing on this material.

PURPOSE: check they understood what matters commercially and to the client, not recall of trivia.

- 12 questions
- Cover: what is covered, what is excluded, what the client must disclose, what the client must do after a loss, and the three points agents most commonly explain incorrectly
- Use realistic client scenarios, not abstract definitions
- For every question: the correct answer AND the source paragraph, so a supervisor can settle a dispute
- For every wrong option: one line on why it is wrong. The explanation is the training, not the score

Include no question whose answer is not directly supported by the sources. If you cannot cite it, do not ask it.

IN PRACTICE

A network briefing on disclosure requirements. Good attendance, clear delivery, register signed. Historically, that would be the end of it. A twelve-question quiz the following morning took agents six minutes. Ten questions answered well. Two were not, both on the same point, and roughly half the network got it wrong in the same direction. The point had been covered accurately, in one sentence of a forty-minute session. It needed a worked example. Two-minute follow-up video, quiz re-run, network

correct. Linkage now holds evidence that a requirement was taught, tested, found deficient, retaught and verified: a materially stronger position than a register.

CHECK BEFORE YOU RELY ON IT

- ☐ Never issue a quiz whose answers you have not verified.
- ☐ An incorrect "correct answer" circulated across a network creates precisely the misunderstanding you were preventing.

CHAPTER 42

Your Toolkit

Outcome *Put the three tools together into one workflow, and commit to a 90-day plan.*

Step	Tool	Purpose
Retrieve	Copilot	What happened, what was decided, what we already said
Establish	Notebook, Chat	What the sources actually require, with citations
Build	Claude, Projects	The procedure, the paper, the deck, the file
Communicate	Notebook, Studio	Every audience in the format that suits them
Confirm	Notebook, quizzes	Whether it landed
Verify	You	Every figure, clause and claim, at every step

The integrated workflow assigns grounded source analysis and communication to Gemini Notebook, and structured production to Claude Projects, subject to current product capabilities and approved use.

And Chapter 7 still governs everything: the tool drafts, you decide, your name is on it. Claude produces more finished-looking work than Copilot; Notebook produces work with citations that make it look verified. Both make it easier to skip the check. Neither makes the check less necessary.

FIRST THIRTY DAYS

- Build one Project properly. Use it daily until it is habit.
- Run the six refusal tests before relying on it.
- Write its handover document; save it to SharePoint.
- Build one notebook and run the four-question sequence.
- Produce one Studio output for an audience you struggle to reach.

DAYS 31 TO 90

- Add Projects one at a time, only when each has proved necessary.

- Build the onboarding notebook your department has never had. Share it read-only.
- Run a quiz after your next staff briefing and act on what it reveals.
- Teach two colleagues the Green, Amber, Red rule.
- If free-tier limits are interrupting real work, take the case to IT and Compliance.

IMPLEMENTATION PLAN, COMPLETE BEFORE YOU LEAVE

- First Project, and its knowledge base
- The prohibition its instructions must carry
- The notebook I will build, and its sources
- The document I rebuild by hand that Claude will produce instead
- The audience I struggle to reach, and the format that reaches them
- What I will never upload
- Where my handover documents will be stored
- How I will know in 90 days whether this worked

TWO THINGS TO CARRY OUT OF THE ROOM

You control what these tools see. No administrator, no audit log, no safety net. Green, Amber, Red, every time.

Build once, make it portable. A Project cannot leave your account, but its instructions can. Store them where Linkage can find them.

APPENDICES

Reference material

A prompt library, checklists, a quick reference, product limits, troubleshooting, a glossary and current learning references. All cross-references use chapter numbers.

Executive Prompt Library

A quick library for reuse. The Microsoft 365 Copilot prompts are condensed forms of the Day 1 chapter prompts. The Claude and Gemini Notebook prompts are listed by name with the chapter that holds the full, copy-ready version.

MICROSOFT 365 COPILOT

COPY-READY PROMPT 1 Executive briefing

Using only [SOURCES], prepare a one-page briefing on [ISSUE]: current position, chronology, commitments, decisions required, risks and evidence gaps. Cite each factual claim and label inference.

COPY-READY PROMPT 2 Meeting preparation

Prepare me for [MEETING] using [SOURCES]. Give purpose, history, open commitments, decisions required, evidence-based discussion points and questions to ask.

COPY-READY PROMPT 3 Document comparison

Compare [A] and [B]. Show different obligations, limits, exclusions, deadlines and commercial terms. Quote decisive wording and identify silence or ambiguity.

COPY-READY PROMPT 4 Board paper section

Draft [SECTION] for [COMMITTEE]. Use [SOURCES]. Structure: recommendation, background, analysis, risks and mitigations, proposed resolution. List unverified points.

COPY-READY PROMPT 5 Thread summary

Summarise this thread: topic, agreements, positions, commitments, outstanding items, contradiction and response required from me.

COPY-READY PROMPT 6 Draft coach

Assess clarity, tone, completeness, unintended commitments and length. Give specific changes before rewriting.

COPY-READY PROMPT 7 Meeting recovery

Summarise purpose, explicit decisions, actions with owner, deadline and evidence, unresolved points and matters relevant to [AREA].

COPY-READY PROMPT 8 Dataset exploration

Assess data quality, calculate [MEASURES] using [DEFINITIONS], compare by [DIMENSION], identify patterns and limitations, and show working.

COPY-READY PROMPT 9 Presentation critique

State the argument, decision requested, removable slides, weak evidence, unanswered audience question and priority improvement.

COPY-READY PROMPT 10 Verification audit

Create Claim | Type | Exact source | Confidence | Manual check. List material gaps and least-certain statements.

CLAUDE AND GEMINI NOTEBOOK

Prompt	Purpose	Chapter
Classify before uploading	Green, Amber or Red classification with redaction guidance	25
Select your five Projects	Decide which contexts justify a permanent workspace	26
Project instructions, the model	The five-block instruction template	27
Formatted procedure document	Produce a real Word deliverable from the knowledge base	29
Project test protocol	Grounding, refusal, format and boundary tests	30
Project handover	Rebuild a Project on another account	31
Interrogate a regulatory document	Discrete cited obligations from a circular	32
The four-question sequence	Locate, reconcile, absence, application	34
Three audiences, one source set	Board, operations and agents from one notebook	37
Product knowledge quiz	Cited assessment after a briefing	41

Executive Checklists

BEFORE ENTERING INFORMATION

CHECK BEFORE YOU RELY ON IT

- ☐ I am using an approved Linkage account and service.
- ☐ I am authorised to use this information for this purpose.
- ☐ I have removed unnecessary personal or sensitive detail.
- ☐ The prompt contains no password, token, API key or credential.
- ☐ I understand where the output will be stored and shared.

BEFORE RELYING ON AN OUTPUT

CHECK BEFORE YOU RELY ON IT

- ☐ The correct source and version were used.
- ☐ Every material name, date, figure, quotation and clause was checked.
- ☐ Citations support the statements made.
- ☐ Calculations were reproduced or reconciled.
- ☐ Inference is visible and reasonable.
- ☐ Required review and approval have been completed.

BEFORE SHARING AN AGENT OR PROJECT

CHECK BEFORE YOU RELY ON IT

- ☐ A saved prompt was insufficient for the need.
- ☐ Purpose and users are narrow and clear.
- ☐ Knowledge sources are approved and current.
- ☐ Prohibitions and human review are explicit.
- ☐ An accountable owner and review cycle are named.
- ☐ IT, Compliance and licensing requirements are satisfied.

Quick Reference

TO DO THIS, USE THIS

To...	Use	Chapter
Find what happened at Linkage	Copilot	1, 2
Stop re-explaining context	Claude Project	26 to 28
Produce a real Word, Excel or PowerPoint file	Claude Project	29
Establish what a document requires	Notebook, Chat	32 to 34
Orient in unfamiliar material	Mind Map	35
Give a team one source of truth	Shared notebook	36
Reach several audiences	Studio	37 to 41
Find out whether it landed	Quizzes	41
Decide whether you may upload	Boundary rule	25

THE BOUNDARY RULE

Tier	Rule
Green	Public or non-sensitive. Upload freely.
Amber	Internal with identifiers. Redact, then upload.
Red	Personal, medical, financial, privileged. Never; use the Copilot Work tab or abstract the question.

SIX LINES WORTH MEMORISING

Say	Get
"What does this NOT address that I would expect?"	The absence question. Often the most valuable thirty seconds of the week.
"Quote the exact wording, do not paraphrase."	A citation instead of a plausible summary.
"Do any of these sources disagree? Quote both."	Contradictions, before they surface elsewhere.
"Deliver this as a Word document I can download."	A deliverable instead of an answer.
"What could a colleague reasonably misunderstand?"	A check to run before distributing any Studio output.
"Not found in the sources available to me."	The refusal to test for in every Project.

Product Limits

Product plans and limits change. Treat these as the limits stated in the source guides, and confirm the current account or workspace plan before delivery or deployment.

CLAUDE, FREE ACCOUNT

Item	Free	If upgraded
Projects	Five	Unlimited
Project sharing	No; use a handover	Team and Enterprise
Expanded knowledge	No; keep to 3 to 5 documents	Automatic
File creation	Yes, once enabled	Yes
Usage	Session-based, hard stop	Higher limits
Linkage oversight	None	Audit logs on Enterprise

GEMINI NOTEBOOK, FREE TIER

Limit	Figure
Notebooks	100
Sources per notebook	50
Chat questions	50 per day
Audio Overviews	About 3 per day
Mind Maps	About 10 per day
Per source	500,000 words or 200MB, identical on every plan

STRETCHING BOTH

- New chat per topic in Claude. Long conversations are re-read in full each turn.
- Three to five documents per Project. Larger sets belong in Notebook.
- Interrogate in Notebook chat before generating, especially audio.
- Write the question properly first time. One specific question beats five exploratory.
- Standing context in Project instructions, where repetition is free.
- Split large PDFs before hitting the 200MB ceiling mid-task.

Troubleshooting

MICROSOFT 365 COPILOT

Symptom	Likely cause	Response
Generic answer	No specific context or source.	Add audience, purpose and approved source.
Too long	No output limit.	Specify word count and sections.
Wrong file or version	Broad source description.	Select or attach the exact approved version.
Unsupported certainty	Gap filled with general knowledge or inference.	Request citations, gaps and inference labels.
Wrong number	Data-quality, definition or calculation issue.	Inspect structure and reproduce the result.
Feature missing	Licence, app version, configuration or policy difference.	Confirm the Linkage environment with IT.
Conversation drift	Unrelated tasks or accumulated instructions.	Start a clean conversation with a full brief.

CLAUDE AND GEMINI NOTEBOOK

Symptom	Cause and fix
Claude answers about Linkage but is wrong	No access to your systems; it is generalising. Upload the source or use Copilot. (Ch 23)
My Project behaves like an ordinary chat	Vague instructions or an empty knowledge base. Rewrite using the five blocks. (Ch 27)
It answered outside its knowledge base	Prohibitions missing or weak. Add the "not found" instruction; re-run refusal tests. (Ch 27, 30)
Cannot create another Project	Capped at five. Export one as a handover, then delete. (Ch 26, 31)
No Word or PowerPoint file	File creation off, or you did not ask explicitly. Settings, Capabilities. (Ch 29)
Answers got worse mid-conversation	The chat has drifted. New conversation, same Project. (Ch 29)
A document will not upload to Notebook	Copy-protected, or over 500,000 words / 200MB. Request an unprotected copy, or split. (Ch 33)
Notebook says I have reached a limit	50 chats, about 3 audio, about 10 mind maps daily. No counter; plan ahead. (Appendix D)
Citation checked out but the answer was wrong	It proves the passage exists, not that the document is current. Check which source. (Ch 33)
Studio output looks impressive but thin	Generated from raw sources. Interrogate first. (Ch

Symptom	Cause and fix
	33)
The Mind Map missed something	Read the thin branches; regenerate after adding sources. Never treat it as authority. (Ch 35)
A feature here is not in my version	Both products change frequently and vary by plan. Check with IT.

Glossary

Term	Definition
Agent	A configured Copilot experience with a defined job, instructions, knowledge and, where permitted, tools or actions.
Analyst	An advanced Copilot agent for multi-step data analysis, where enabled.
Boundary rule	The Green, Amber, Red classification that decides whether information may be uploaded to an external AI tool.
Claude Project	A persistent Claude workspace with standing instructions and an uploaded knowledge base.
Copilot Chat	A conversational Copilot experience for drafting, catch-up, questions and supported grounding.
Copilot Pages	A persistent collaborative surface for developing and sharing Copilot-assisted content.
GCSE	Goal, Context, Source and Expectations: the executive prompt framework.
Gemini Notebook	A source-grounded tool (formerly NotebookLM) that answers with citations from a fixed set of uploaded sources.
Grounding	Using relevant source material to support a response.
Handover	A document that lets a colleague rebuild a Project or notebook, and the governing artefact on an individual plan.
Inference	A conclusion drawn from evidence rather than directly stated in it.
Knowledge base	The set of documents attached to a Project or notebook that the tool answers from.
Microsoft Graph	The Microsoft 365 data and relationship layer used to provide permitted organisational context.
Mind Map	A branching Studio diagram of a source set, used to orient and to spot gaps.
NAICOM	The National Insurance Commission, Nigeria's insurance regulator.
NDPA 2023	The Nigeria Data Protection Act 2023, under which the user remains the data controller.
Prompt	The instruction or question given to the tool.
Redaction	Deleting identifiers from a document, so the

Term	Definition
	substance survives without the personal data.
Researcher	An advanced Copilot agent for deeper, cited research workflows, where enabled.
Studio	The Gemini Notebook panel that generates reports, infographics, video, audio and quizzes from a source set.

Product Currency and Learning References

Microsoft 365 Copilot, Claude and Gemini Notebook all change frequently. Interface labels, availability and behaviour differ by licence, tenant configuration, app version and product release. Confirm the Linkage environment with IT. Linkage policy and approved processes take precedence over the general examples in this manual.

MICROSOFT 365 COPILOT

- Microsoft Learn: Draft, analyse and present with Microsoft 365 Copilot.
- Microsoft Support: Get started writing prompts in Microsoft 365 Copilot.
- Microsoft documentation: Microsoft 365 Copilot overview and features in Microsoft 365 apps.
- Microsoft documentation: Agents admin guide for Microsoft 365.
- Microsoft Support: Microsoft Copilot Academy in Viva Learning.

CLAUDE AND GEMINI NOTEBOOK

- Anthropic: Claude Projects, instructions and knowledge base documentation.
- Anthropic: enabling code execution and file creation in Claude settings.
- Google: Gemini Notebook (NotebookLM) sources, chat, Studio and sharing documentation.
- Confirm free-tier limits and account type (Workspace or personal) before uploading anything beyond Green-tier.

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NOTES

[illegible]

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NOTES

[illegible]

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