AIVELLI

STARTER GUIDE
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A PRACTICAL GUIDE FOR BUSINESS LEADERS

Your AI Starter Guide

The prompts to use, the rules to agree on with your team and the questions to answer as AI becomes part of how your company works.

SESSION

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START HERE

How to use this guide

This guide is a practical addition to the session. It brings what was covered there into a hands-on form: the prompts to use, the rules to agree on with your team, the workflows to consider and the questions to answer together, whether your company is introducing AI or already uses it. Most prompts work in every major AI assistant.

New to AI
Start with Part 1, set up your voice in Part 2 (10 minutes), then try 1 prompt a day from Part 3 for a week.

Already using AI
Read it through anyway: there is always something new. Let the checklists guide your next steps.

Leading a team or a company
Start with Parts 5 and 6, then share Parts 1 to 4 with your team.

Where a step needs the AI assistant connected to your mail, calendar or files, the guide says so.

> **About the prompts.** Every prompt in this guide is an example. Replace the words in [square brackets] with your own, add your context and adapt each prompt to your industry and situation.

IN THIS GUIDE

1 How AI works
2 Make AI write in your voice
3 The everyday kit
4 Checking AI output before it leaves your desk
5 What goes into AI and what never does
6 Taking AI into your company

General information for education, not legal or professional advice. See the note on the last page.

PART 1

1 How AI works

How generative AI works

Generative AI, the technology behind every AI assistant, is trained on a very large body of text and predicts what most plausibly comes next. 4 things follow for anyone who uses it at work:

ILLUSTRATION · HOW IT CHOOSES THE NEXT WORD

Thank you for your ____

It continues with the word that most plausibly comes next. Plausible is not the same as correct.

It writes with the same certainty whether it is right or wrong.
Its answers sound right. That does not mean they are right. Review its output before you use it.

It does not always give sources.
Add "show the source for every fact" to any question where the facts matter. Then check each source yourself: that it exists and that it is credible.

It knows public information. It does not know your company.
Give it context: your own documents, notes and numbers. Describe your situation. Then the answer fits your company.

Use only the tool your company has approved.
What may go into it depends on how sensitive the information is and on your company's own rules. When in doubt, ask before you paste.

The prompt decides the result

A prompt is what you type into the AI assistant. Write it the way you would brief a capable new colleague and the result is much better. The same task, 2 prompts:

A weak prompt

PROMPT

Make me a presentation about our Q3 results.

The result: 15 generic slides for no particular audience.

A better prompt

PROMPT

You are my chief of staff. The board meets Friday, I have 20 minutes and they decide next year's budget. Here are the Q3 numbers. I need them to approve the budget. Make me 8 slides, 1 message per slide, the numbers as charts.

Role + **Context** + **Outcome** + **Format** = **The result you wanted**

PART OF THE PROMPT	THE QUESTION IT ANSWERS	IN THE EXAMPLE
Role	What should the AI assistant be for this task?	Chief of staff
Context	Who is the work for and what does it need to know?	The board, 20 minutes, a budget decision, the Q3 numbers
Outcome	What has to happen at the end?	The board approves the budget
Format	Length, shape, language	8 slides, 1 message each, charts

The outcome is what makes a prompt strong. Tell the AI what you are trying to achieve and let it work out how to get there. Add your own steps only where the order matters. A prompt you can reuse:

> **PROMPT**
>
> You are my [role]. Here is what has to happen: [the result you need, by when, for whom]. Here is what I have: [data, documents, constraints]. Ask me what you need to know first. Then propose 3 different ways to get there and say which one you would choose.

The first answer is a first draft

Treat the exchange as a conversation: question, correct, ask again. 6 follow-up questions that improve almost any answer:

WHEN	ASK
Before it starts	"Before you start, ask me the 5 questions that matter most for this."
The answer is flat	"Give me 3 very different versions, then tell me which is strongest and why."
You want honesty	"What is weak or missing in this? Be direct."
It is too long	"Cut this to half the length. Keep every number and every decision."
It is for someone else	"Rewrite this for [the reader], who cares most about [their concern]."
Facts matter	"Show the source for every fact. Mark anything you could not source."

> **Keep what works.** When a prompt gives a good result, save it in a note called “My prompts”. Within a month you have a personal library for the tasks that repeat every week. Some AI assistants have a built-in place to save prompts.

From assistant to agent

In a chat, AI works as an assistant: you ask, it answers, you decide what to do with the answer. An agent goes 1 step further. You give it a goal and it takes the steps itself.

ASSISTANT

You ask, it answers

"Which invoices are overdue?"

It reads your files and gives you the list. You do the rest.

AGENT

You give a goal, it takes the steps

"Chase the overdue invoices."

It finds them, drafts each reminder, puts them in your drafts folder and updates the list.

What makes it an agent

A goal	It works toward a result you set, over several steps, while a chat answers 1 question at a time.
Tools	It can use what you connect it to: your mail, your calendar, your files or a company system. That is how it acts.
Its own next step	It decides what to do next and continues until the task is done or it needs you.

What agents can do at work

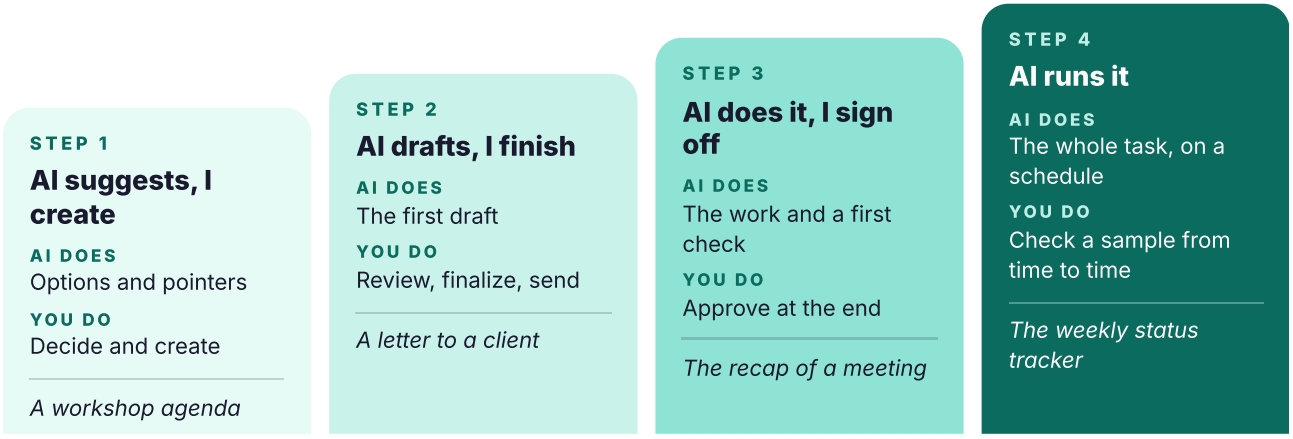
Connected to your tools, with your approval at the steps that matter:

WHERE	EXAMPLE
Meetings	After each meeting it writes the minutes, turns the decisions into tasks with owners and dates and sends them on your behalf once you approve. Before the next meeting it reports what is still open.
Sales	When a request arrives it reads the client's history in your mail and customer system, drafts a proposal from your price list and earlier offers, plans the follow-up in your calendar and reminds you when the client stays silent.
Finance	Every Monday it matches open invoices against incoming payments, drafts the reminders for the overdue ones and flags the cases that need a phone call.
Customer service	It answers routine questions from your knowledge base, opens a ticket for the rest, sends it to the right team and updates the customer record.

> **3 rules before an agent acts for you.** It prepares and a person approves, until the task has proven itself. It gets access only to what the task needs. A named person is responsible for what it sends, books or pays.

Delegating a task to AI: 4 steps

How much you hand over is your choice, task by task. An agent does not start with full freedom: a task starts at the lowest step that fits and moves up only after it has shown it can be trusted. Step 4 is for low-risk work that stays inside the team.



2 questions decide the step for each task: **how expensive is a mistake** and **how easily would you catch it?** An error in an internal summary costs little and is noticed quickly. An error in a contract is costly and may go unnoticed for weeks. Decide the step on those 2 answers and review it as the task proves itself.

> **A common mistake.** AI makes writing cheap, so output grows: a 3-line update becomes a 5-page report and the reader asks AI to reduce it to 3 lines again. Start with the outcome. Before you ask for a document, ask what the reader needs to decide or do.

CHECKLIST

- [ ] My prompts carry a role, the context, the outcome and the format.
- [ ] I ask for questions or options before I accept a first answer.
- [ ] I keep my best prompts in 1 place.
- [ ] I can explain the difference between an assistant and an agent.

PART 2

2 Make AI write in your voice

Without instructions, most AI assistants write in a similar neutral style and experienced readers notice it. 10 minutes of setup changes every draft you will ask for from now on.

First · Ask it to describe how you write. If your AI assistant is connected to your mailbox, use this prompt:

> **PROMPT**
>
> You are my writing coach. Read the emails I sent in the last 3 months. Describe how I write: tone, sentence length, greetings, sign-offs, how I ask for things, words I use often and words I never use. Turn that into custom instructions of maximum 150 words that make your drafts sound like me. Only use patterns that appear in at least 5 emails.

If it is not connected, paste 10 of your emails into your approved tool, with names and confidential details removed. In the prompt, change "the emails I sent in the last 3 months" to "these 10 emails".

Then · Save the result. Open your AI assistant's settings and find the custom instructions (some tools call it personalization or preferences). Paste the description there.

From then on every draft starts in your voice and correcting it takes far less time.

If English is your second language. "Polish this" often changes your voice as well as your grammar. Ask for less:

> **PROMPT**
>
> You are my editor. Correct the grammar and spelling only. Keep my words, my sentence length and my tone. Show me each change you made.

CHECKLIST

- [ ] My writing style is saved in my AI assistant's settings.
- [ ] I asked for a reply to a real email and it sounded like me.

PART 3

3 The everyday kit

Most of a working week is spent in 4 places: mail, meetings, documents and numbers. Prompts marked **Connected** need an AI assistant linked to your mail, calendar or company files; ask your IT team what yours can reach. All other prompts work by pasting or uploading.

Mail

Sorting CONNECTED

PROMPT

You are my mail assistant. Review my inbox of the last 30 days and propose 3 folders that would keep it organized. For each folder, list the rules that would move new email into it. After I confirm, create the folders and the rules.

Check the sorting for the first few days. If your AI assistant cannot create folders or rules, ask it to write the steps for your mail program and set them up yourself.

A morning overview CONNECTED

PROMPT

You are my chief of staff. Read my email, chats and calendar since yesterday afternoon. Give me 1 overview: what needs me today, my meetings with any open questions, what can wait. Maximum 15 lines.

If your AI assistant can run a prompt on a schedule, set this for 8:30 every working day.

Everything on 1 topic CONNECTED

PROMPT

You are my research assistant. Find everything on [topic] in my email, chats, meetings and files. Tell me who owns it, what was decided, what is still open and what I should do next. Link every source.

A long thread PASTE

PROMPT

You are my assistant. Summarize this thread in 3 lines: what is asked of me and by when. Then draft my reply. My answer in 1 line: [your point].

Paste the thread under the prompt, or open it first if your AI assistant works inside your mail program.

Meetings

Before
Rehearse with your audience

During
Transcribe the meeting

After
Actions and minutes

Before: a rehearsal with your audience. Upload your presentation:

> PROMPT
>
> Act as [the client / my manager / the board]. Read this presentation. What is your takeaway, in 1 sentence? Then list the 5 questions you would ask me.

If the takeaway is not the one you intended, you found the problem before the meeting. Put the answers to the 5 questions into the deck.

During: transcribe your online meetings where your company allows it. Tell participants before you start. The rules on consent differ by country, so agree on this with your legal team first. Keep recordings in company tools. A transcript gives your AI assistant something to work with: it can find the decisions, list the action points and draft the minutes. It also lets you find your own part without listening to the whole hour:

> PROMPT
>
> You are my assistant. From this transcript: what was decided about [topic] and what is expected from me?

After: actions and minutes

> PROMPT
>
> You are my meeting assistant. From this transcript, list every action with the owner and deadline as they were said. Mark any action that has no owner. Then draft short minutes I can check and send.

Documents

One source, a version per reader. Put all sources in once:

> PROMPT
>
> You are my communications lead. Here are [the sources]. Write 3 versions. For finance: the numbers and the risks. For the project lead: operations and next steps. For the board: the decision we need, on 1 page.

DOCUMENTS · 2 MORE WAYS

Two more ways to use your documents

Both save time on long documents. The example here is Microsoft 365 Copilot.

1 · Send an assistant instead of the document

A long handbook, a policy or a project file is rarely read to the end. You can build a small assistant that answers from those files and share it the way you share a link. Readers ask it their question and get the answer, usually with its source.

How it works. You create the assistant, add the files and write its instructions in plain words. For example:

> INSTRUCTIONS
>
> You answer questions about our onboarding handbook. Use only the files I added. If the answer is not in them, say so. If a question is unclear, ask what the person means before you answer. Never invent a number, a date or a name. If 2 documents contradict each other, show both and name them.

This is an example. Change the instructions and add your own rules until the assistant does exactly what you need.

Where it helps. The onboarding handbook, HR policies, a product manual, the file of a long project.

> **Before you share it.** Switch off the web search, so the answers come from your files only. Test it thoroughly: with questions you know the answer to, questions the files do not answer and unclear questions. Give it only files that every reader may open. Part 5 explains what you share when you share an assistant.

2 · Listen to a document

An AI assistant can turn 1 or more documents into a spoken summary that you play like a podcast: on the way to a meeting, in the car or on a walk.

How it works. You put your documents in 1 place and ask for an audio overview. You choose the form: 1 narrator or a dialogue between 2 voices, short or long, professional or casual. You can also add your own instruction, for example **“Focus on the decisions and the open questions.”**

Where it helps. Learning a new topic, a long report before a meeting or the material for a workshop.

In Microsoft 365 Copilot this is the audio overview of a notebook. It speaks 8 languages today, including English.

> GOOD TO KNOW
>
> In Microsoft 365 Copilot both need a work account and, in most companies, the paid Copilot license. Georgian is currently not among the languages Copilot supports at work, in chat or in audio, so use English or another supported language.

Numbers

Upload the spreadsheet (internal data only in the approved tool, Part 5) and ask:

GOAL	ASK
Understand it	"Explain this sheet: what each tab is, where the totals come from, which cells are typed by hand."
Clean it	"Find duplicates, inconsistent names and mixed formats. Fix them and list what you changed."
A formula	"Add a column that **[what you want, in plain words]**. Write the formula and explain it."
What changed	"Here is this week's file and last week's. What changed?"
A dashboard	"Build a dashboard from these numbers: the 5 figures that matter most, each as a chart, with 1 line on what it shows."

For every figure you will quote, ask for the source cell.

Going further: handing over a whole task

AI can do more than answer 1 request at a time. With clear instructions it can carry a task with many steps and many people from start to finish.

Example: an internal event for 40 colleagues. Connected to your mail, calendar and files, an AI assistant can take over most of the organizing:

1. **Ask.** It writes every colleague a short personal message: which dates work and any dietary wishes.
2. **Track.** It puts the answers in a sheet, reminds after 2 days whoever has not answered and sends you the status every day.
3. **Propose.** It picks the date that fits most people and drafts the order for the caterer.
4. **Close.** After your approval it sends the invitation and the order, then hands you the final overview.

You decide where it stops for your approval: at every message, or only at the wording of the first message and at the steps that matter, such as the date and the order. How much of this an AI assistant does by itself depends on the tool and on what it is connected to.

CHECKLIST

- [ ] I know which of my tools are connected to mail, calendar and files.
- [ ] Where it is allowed, my online meetings are transcribed and the actions reach the task list.
- [ ] I tried all 5 asks on a real spreadsheet.

PART 4

4 Checking AI output before it leaves your desk

AI drafts quickly, but you are responsible for what you send. Checking the sources yourself takes a few minutes more.

> **The rule:** everything AI produces is checked before it goes out. How deep the check goes depends on how sensitive the content is and on where it is going.

How to check

1	2	3	4
Let AI prepare the check	**Open every source yourself**	**Ask for the source**	**Higher risk, deeper check**

1. **Let AI prepare the check.** AI cannot guarantee that its own answer is correct. It can make your check faster:

> PROMPT
>
> You are my fact-checker. List every name, number, date, quote and reference in this text in a table, with the source each one came from. Mark any that has no source.

2. **Open every source yourself.** A link that does not open, or a page that says something else, means the fact is removed.
3. **Ask for the source** rather than "are you sure?" The AI assistant will usually say yes. A source is something you can check.
4. **Higher risk, deeper check.** An internal summary gets a quick read. A contract, a price, a client letter or anything public gets every fact opened.

CHECKLIST

- [ ] Nothing AI produced is sent or shared unchecked.
- [ ] My team knows how to check AI output.

> **A word you will hear: hallucination.** When an AI assistant states something wrong with full confidence, that is called a hallucination. It happens because AI predicts the most plausible next word and writes a fluent answer even when it does not have the facts. It can invent a name, a number or a quote. The 4 steps above help you catch it.

PART 5

5 What goes into AI and what never does

4 classes of information, each with its own rule. Adjust the examples to your company and agree on them as a team; you will disagree on some examples and those disagreements are exactly why the rules must be written down.

Public	**Internal**	**Confidential**	**Restricted**
Any AI tool	Approved tool only	Approved tool, with an agreement	Never in any AI tool

CLASS	EXAMPLES	WHERE IT MAY GO
Public	Already on your website: the press release, the price list, the brochure	Any AI tool. For company work, use the approved one.
Internal	Minutes, plans, drafts, transcripts, the policy you are rewriting	The company's approved tool only
Confidential	Customer and employee data, contracts, pricing, financials before publication	The approved tool with a data processing agreement and only when the task requires it
Restricted	Passwords, access keys, card numbers, information you are contractually forbidden to share with any third party	Never in any AI tool

Personal data, such as customer and employee data, is also protected by data protection law. Agree these rules with the person responsible for legal or data protection in your company.

A quick check. Which class is each of these?

1. The guest list for a client event
2. The annual report on your website
3. The salary file
4. A supplier's bank details

Answers: 1 confidential, 2 public, 3 confidential at least and restricted in many companies, 4 confidential.

Personal account or business subscription

	PERSONAL AND FREE ACCOUNTS	BUSINESS AND ENTERPRISE SUBSCRIPTIONS
Used to train the model?	Usually yes, unless you switch it off in the settings. Some vendors also let reviewers read a sample of conversations.	Not by default, under the business contract
Who decides how long chats are kept?	The vendor, within your settings	Your company, within what its plan allows
Contract	The vendor's consumer terms and privacy policy, accepted by the employee. The company is not a party and has no data processing agreement	Between the vendor and the company, with a data processing agreement

The business subscription is the first control: it moves your data from a contract with 1 employee to a contract with the company. Vendors differ: check your vendor's terms.

> **Sharing.** A shared chat, project or AI assistant can expose what is stored inside it: the conversation, the instructions and the content of files uploaded into it. Share it only with the people who need it.

CHECKLIST

- [ ] The 4 classes are written down, with our own examples and everyone who uses AI has seen them.
- [ ] Everyone who uses AI for work does so on a business subscription.
- [ ] I know whether my personal AI accounts may use my conversations for training and I made that choice on purpose.

PART 6

6 Taking AI into your company

Everything above makes 1 person more effective. A company gains when a whole team works this way. That depends less on the tool and more on 6 decisions.

6 questions to answer before you start

QUESTION	WHY IT MATTERS
1. Who goes first and with which task?	A rollout to everyone at once often gives you many curious users and little you can measure. An AI lead, 2 or 3 champions and a few volunteers, each with their own tasks, give you something you can measure after the first month.
2. Who owns AI and who owns its use?	IT owns the tool. Each team owns its own use cases. Leadership sets the rules and the priorities.
3. Which tool, on which plan?	One approved tool on a business subscription, chosen by what your people need most. Personal accounts are never used for company work.
4. What goes in and what never does?	Part 5, written down and agreed with the team
5. Who checks what the AI assistant sends, books or pays?	Anything that leaves the company or moves money has a named approver.
6. How will you know it works?	A measure taken before you start and again a few weeks in, on the result and the hours, per team

A 1-minute self-check

Tick each statement that is true today.

- [ ] We know who our AI lead and champions would be, and which tasks they start with.
- [ ] Ownership of AI is agreed between leadership, IT and the teams.
- [ ] Everyone who uses AI for work uses an approved tool on a business subscription.
- [ ] Our 4 data classes are written down and known.
- [ ] Anything an AI assistant sends or pays has a named approver.
- [ ] We have measured where the time goes before changing anything.

> **Reading your result.** Every statement you could not tick is a gap to close. If statements 1 to 3 are among them, start there, before anyone buys more licenses.

Not sure how to close a gap? That is what the free call on the last page is for.

How to pick your first task

The best first task meets 4 criteria: it repeats every week, takes real time, costs little if it goes wrong and is easy to check. Ask your AI assistant to interview you about your last working week, 1 question at a time, and to list the tasks that repeat. Then test each task against the 4 criteria.

An example of a first month: start small and keep going

WHEN	WHAT HAPPENS	WATCH OUT FOR
Week 1 **Start small**	Leadership decides to adopt AI and names an AI lead: a senior person with the power to decide. The AI lead asks 2 or 3 departments for a champion each: people who like to help colleagues and want to try new tools.	Starting with every department at once.
Week 2 **Choose**	Each champion brings the tasks that cost their team the most time. From that list the champions choose the tool. IT helps to buy it and set it up.	Buying the tool before the tasks are clear.
Week 3 **Build**	Each champion finds 3 or 4 volunteers in their own team. Together they pick their first tasks, measure them and start building. They experiment and bring in a trainer where they need one.	Nothing measured before, so no result to show.
Week 4 **Share**	The teams keep building. The champions meet every week, show what worked and take it back to their teams. The AI lead keeps leadership informed.	Champions who get no time for it.
After month 1 **Roll out**	The first month is the start. The same teams continue and more departments join, each with its own champion.	The champions stop meeting.

AI readiness: clean up before an assistant reads your files

PART 1

Clean the content

Check that each source is current. Where 2 documents disagree, keep 1. Archive what nobody uses.

PART 2

Check the permissions

Close files shared with the whole company, old project folders and sharing links that never expire.

PART 3

Keep it clean

Name an owner for each source. Decide what stays out. Set a regular refresh date.

When does a seat pay for itself?

hours saved × **cost of 1 hour of work** − **cost of the seat** = **gain per month**

cost of the seat ÷ **cost of 1 hour of work** = **hours it must save per month**

Per person, with your own 2 numbers. Count training time as a cost in the first month. Time is where the calculation starts. The larger value is in what people do with the hours they get back: faster answers to customers, fewer errors, work that was never done before.

CHECKLIST

- [ ] We have answered the 6 questions in writing.
- [ ] We did the self-check and know which gaps to close.
- [ ] We have named the AI lead, the champions and their first tasks.

AFTER THE GUIDE

What next

This guide gets you started at your own desk. Making AI part of how a whole company works takes a plan, people who lead it and practice. Aivelli works with companies in 4 ways.

1 TEAM, 1 DAY

AI Adoption Day

A team learns how AI works and how to check it, then turns its own recurring tasks into working assistants.

THE ORGANIZATION, 4 WEEKS

AI Adoption Month

4 weeks that take a company from the intention to adopt AI to an adoption plan, named champions and the first people trained.

YOUR CHAMPIONS, ALL YEAR

Champions Program

AI changes fast. Your champions stay up to date and get regular support, so the rollout keeps going.

BOARD-LEVEL ADVICE

Ongoing advisory

A dedicated adviser for your leadership, in the rhythm and on the assignments you agree together.

A free call with Lela

Not sure where to begin? This call is the easiest first step. Together you explore where AI can help your company and what could be done first. An open conversation, with no commitment.

Book it at aivelli.com/tbilisi or write to lelagagua@aivelli.com

ABOUT THE AUTHOR

Lela Gagua · Founder, Aivelli

Lela Gagua is the founder of Aivelli, a Dutch company that teaches business leaders how to apply AI in their everyday work and guides companies through adopting it. Born in Georgia and based in the Netherlands, she helps leaders identify practical AI opportunities, change how their teams work and adopt AI with data security and responsible use built in from the start.

She brings 15 years in technology program and project management at major international companies, leading complex technology programs, global teams and relationships with international customers. She holds a degree in Applied Mathematics and Computer Science and completed executive education at Cambridge Judge Business School, University of Cambridge.

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