

The Practical AI Guide for *Australian Businesses*

Two AI assistants, one playbook. Everything your team needs to get real value from Claude and Microsoft Copilot: setup and pricing, prompting that works, copy-paste templates for everyday business jobs, and the dos and don'ts of responsible use.

Claude for Business

01

The strongest assistant for long-form writing and thinking: proposals, reports, marketing copy and analysis. Setup, plans, prompting formula and five templates.

Pages 2–4

Microsoft Copilot for Business

02

AI inside the Microsoft 365 apps you already use: Word, Excel, Outlook, Teams and PowerPoint, grounded in your own files, meetings and inbox.

Pages 5–7

Choosing Your Mix and Next Steps

03

Which tool for which job, a side-by-side comparison, and a 30-day plan to go from zero to a confident, safe AI habit across the team.

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Claude for *Business*

Claude is an AI assistant made by Anthropic. Think of it as a capable extra colleague who drafts proposals, writes marketing copy, summarises long documents, tidies spreadsheets and plans campaigns, through a simple chat on web, desktop and mobile.

1.1 Getting started and what it costs

Sign up at claude.ai with a work email; the free plan is enough to trial it. For business use, move to **Pro** for individuals or **Team** for the whole company: Team adds central billing, admin controls and shared projects, and your data is not used to train models by default.

PLAN	PRICE (APPROX. AUD)*	BEST FOR
Free	\$0	Trying Claude out, occasional use
Pro START HERE	About A\$26 to A\$31 / month	Your heavy writers: bigger documents, projects, priority access
Team	From about A\$31 / seat / month	Whole-of-company use, admin controls, shared projects, central billing
Max	From about A\$154 / month	Power users who live in AI all day: 5 to 20x more usage

*Anthropic bills in US dollars (Pro US\$17–20, Team from US\$20, Max from US\$100). AUD figures are approximate conversions at July 2026 rates.

- ★ **Good to know:** on Team and Enterprise plans, Anthropic does not use your data to train its models by default. Connectors are available for Gmail, Google Drive, Microsoft 365, Slack, HubSpot and more, and Claude reads PDFs, Word documents and spreadsheets you attach.

1.2 How to ask: the four-part prompt

The single biggest quality lever is your prompt. Build every request from four parts:



✗ WEAK PROMPT

"Write a follow-up email to our customers."

Missing: who you are · which customers · the goal · tone · length

Result: generic, could be from any company anywhere.

✓ STRONG PROMPT

"You are a marketing writer for a Brisbane landscaping company. **[ROLE]** Our spring promotion generated 120 quotes and 85 booked jobs; about 35 people got a quote but never booked. **[CONTEXT]** Write a friendly follow-up email to the quote-but-no-booking group with a 10% offer valid to end of month. **[TASK]** Under 130 words, plain Australian English, with a subject line and one clear call to action. **[FORMAT]**"

Result: specific, on-brand, ready to send with light edits.

Show an example

Paste a past proposal or email and say *"match this tone and style"*. Claude imitates examples far better than lists of adjectives.

Make Claude interview you

End with *"Ask me up to 5 questions before you start."* It surfaces details you forgot and prevents generic output.

Iterate, don't restart

Treat draft one as round one. Reply *"shorter", "more formal", "add a call to action", "make version B for existing clients"*.



Attach your files. Upload a tender's requirements and your capability statement, then ask for draft responses that use both. In long prompts, label the parts clearly, e.g. "REQUIREMENTS: ... OUR INFO: ...", so Claude knows what is what.

1.3 Copy-paste templates

Swap the **[bracketed]** parts for your details, paste into Claude, and refine from there.

1 Proposal or tender draft

SALES

You are an experienced bid writer for **[company name]**, which **[one-line description]**. Attached are the client's requirements and our capability statement. Draft responses to each requirement using plain, confident language and our real figures: **[projects delivered, results, team size]**. Flag anything we lack evidence for with **[NEED INFO]** rather than inventing it. Respect word and page limits exactly.

2 New business outreach

SALES

Write a first-approach email to **[company / person]**, who likely cares about **[their pain point]**. We are **[company + what you do]** and we want **[specific ask, e.g. a 15 minute intro call]**. Professional but human, under 150 words: one proof point (a result or client name), one clear ask, no jargon. Give me two subject line options.

3 Marketing & social pack

MARKETING

Here is our news: **[paste announcement, offer or project story]**. Create one Facebook post (warm, 80 words), one LinkedIn post (professional, 120 words), three Instagram caption options with hashtags, and a short piece for our email newsletter. Audience: **[homeowners / local businesses / trade clients]**. End each with a call to action to **[link]**.

4 Meeting minutes & actions

OPERATIONS

Here are my rough notes from **[meeting]**: **[paste notes or transcript]**. Turn these into clean minutes: attendees, decisions made, action items with owners and due dates, and items carried over. Flag anything ambiguous as **[CHECK]**. Then draft a short follow-up message to the team with just the actions.

5 One document into many

MARKETING

Attached is our **[case study / annual review / project report]**. Extract the five most compelling results and stories. For each, write a two-sentence version for social media and a one-paragraph version for proposals. Keep every number exactly as it appears in the source.

Pro tip: set up a Project. On Pro and Team plans, create a **Project** and load it once with your company profile, tone-of-voice examples, key numbers and a past proposal. Every chat inside that Project then already knows your business, so you stop repeating yourself.

1.4 Dos and don'ts

✓ DO

- ✓ **Verify every fact, figure and claim** before it goes out. AI can state wrong things confidently.
- ✓ **Use it for drafts, summaries, brainstorming,** editing and repurposing content.
- ✓ **Give real context:** your business, audience, numbers and examples of past work.
- ✓ **Write a one-page AI use policy** and walk the whole team through it.
- ✓ **Keep the human voice:** edit drafts so they sound like your business.
- ✓ **Use a Team plan for company use:** admin controls, and no training on your data by default.

✗ DON'T

- ✗ **Don't publish AI output unread.** A human always reviews anything public or sent to clients.
- ✗ **Don't paste in customer or staff personal details,** financial records, credentials or anything under NDA.
- ✗ **Don't let AI make decisions about people:** hiring, performance, credit or complaints outcomes.
- ✗ **Don't use AI unsupervised for sensitive comms:** complaints, redundancies, safety incidents.
- ✗ **Don't assume clients can't tell.** Generic AI text is easy to spot; personalise everything.
- ✗ **Don't treat chats as storage.** Keep master copies in your own systems.

1.5 Privacy and responsible use in 60 seconds

The golden rule

Never enter anything you would not paste into a public website. De-identify first: "a commercial client in aged care", not their name.

Know your obligations

The Privacy Act and APPs, client confidentiality clauses and NDAs still apply to anything you put into any AI tool.

Adopt a short policy

What AI may be used for, what it may never be used for, and who signs off. Ask Claude: "Draft a one-page AI use policy for a small Australian business."

Be straight with clients

If AI meaningfully contributed to paid deliverables, know your position on disclosure before a client asks.

1.6 Useful links

Start here claude.ai **Plans and pricing** claude.com/pricing **Prompting guide** docs.claude.com **Desktop & mobile apps** claude.ai/download

Microsoft Copilot for *Business*

Copilot is Microsoft's AI assistant, built into the Microsoft 365 apps your team already uses. It recaps meetings in Teams, summarises email threads in Outlook, drafts documents in Word, analyses data in Excel and builds presentations in PowerPoint, grounded in your own files.

2.1 Getting started and what it costs

If you already have Microsoft 365, you already have the entry point: **Copilot Chat is included** in business plans at no extra charge. Microsoft now also bundles full Copilot into its Business Standard and Premium tiers in Australia, so you no longer need a separate add-on licence on these plans.

PLAN	PRICE (AUD)*	WHAT YOU GET
M365 Business Basic	A\$10.50 / user / month	Web and mobile Office apps, Teams, 1TB storage each, and Copilot Chat included
M365 Business Standard WITH COPILOT	A\$35.20 / user / month	Desktop Office apps plus Microsoft 365 Copilot Business inside Word, Excel, PowerPoint, Outlook and Teams
M365 Business Premium WITH COPILOT	A\$47.90 / user / month	Everything in Standard plus advanced security and device management

*Australian pricing, ex GST, paid yearly. Current as at July 2026; confirm at microsoft.com/en-au before purchase.

- ★ **Good to know:** start free with Copilot Chat for drafting and research, then move the staff who live in documents, spreadsheets and meetings to a with-Copilot tier. Prompts and responses stay inside your Microsoft 365 tenant's enterprise data protection and are not used to train the underlying models.

2.2 How to ask: the four-part prompt

Microsoft's own prompt guidance uses four ingredients. Build every request from:



✗ WEAK PROMPT

"Write a follow-up email to our customers."

Missing: goal detail · audience · source files · tone · length

Result: generic, ignores everything already in your files.

✓ STRONG PROMPT (COPILOT IN WORD)

"Draft a follow-up email to customers who received a quote in our spring promotion but haven't booked. **[GOAL]** We are a Brisbane landscaping company; the promotion generated 120 quotes and 85 booked jobs. **[CONTEXT]** Use the quote list in */Spring Promo Tracker.xlsx* and match the tone of */Customer Newsletter May.docx*. **[SOURCE]** Friendly, under 130 words, with a subject line and a 10% offer valid to end of month. **[EXPECTATIONS]**"

Result: specific, on-brand, grounded in your real numbers.

Reference files with /

Type **/** in a prompt to point Copilot at a specific document, spreadsheet or deck. Grounding a prompt in real files is the biggest quality jump.

Use it in the right app

Recaps live in *Teams*, thread summaries in *Outlook*, drafting in *Word*, analysis in *Excel*, decks in *PowerPoint*. Same Copilot, different superpowers.

Iterate, don't restart

Treat draft one as round one. Reply *"shorter"*, *"more formal"*, *"make it a table"*, *"add a slide on pricing"*. Each pass takes seconds.



Quick wins first. Start with meeting recaps and email thread summaries: they need no setup, save hours in week one, and build the team's confidence before you move to proposals and data analysis.

2.3 Copy-paste templates

Swap the **[bracketed]** parts for your details. The **/file** references point Copilot at your own documents.

1 Proposal or tender draft

COPILOT IN WORD

Draft responses to each requirement in **/Client Requirements.pdf** for **[company name]**, which **[one-line description]**. Use plain, confident language and the real figures in **/Capability Statement.docx** and **/Project Results.xlsx**: **[projects delivered, results, team size]**. Flag anything we lack evidence for with **[NEED INFO]** rather than inventing it. Respect word and page limits exactly.

2 Sales & customer insights

COPILOT IN EXCEL

Analyse the customer data in this workbook. Show sales patterns by **[product / region / month]**, highlight customers who bought last year but not this year, and create a chart of repeat-purchase frequency by segment. Then suggest three segments we should target for **[next quarter's campaign]** and why.

3 Campaign & social pack

COPILOT CHAT

Here is our news: **[paste announcement, offer or project story]**. Create one Facebook post (warm, 80 words), one LinkedIn post (professional, 120 words), three Instagram caption options with hashtags, and a short newsletter piece. Audience: **[homeowners / local businesses / trade clients]**. End each with a call to action to **[link]**.

4 Meeting recap & minutes

COPILOT IN TEAMS

Recap this meeting: key decisions, action items with owners and due dates, and open questions, in a table. Then draft a follow-up email to attendees summarising the outcomes and asking owners to confirm their deadlines. Flag anything ambiguous as **[CHECK]**.

5 Inbox catch-up

COPILOT IN OUTLOOK

Summarise this email thread: what has been agreed, what is still open, and who is waiting on us. Then draft a reply that **[confirms the delivery date / declines politely / asks the three missing questions]**. Professional but warm, under 120 words.

What early Copilot users report

70%

say they are more productive

85%

get to a good first draft faster

75%

spend less time searching files

77%

would not go back to working without it

2.4 Dos and don'ts

✓ DO

- ✓ **Verify every fact, figure and claim** before it goes out. AI can state wrong things confidently.
- ✓ **Ground prompts in your files** with / references; that is where Copilot beats a blank chatbot.
- ✓ **Tidy SharePoint and OneDrive permissions first.** Copilot can surface anything a user can already access, including payroll files with sloppy sharing settings.
- ✓ **Start with free Copilot Chat** and quick wins, then upgrade the heavy document users.
- ✓ **Write a one-page AI use policy** and walk the whole team through it.
- ✓ **Keep the human voice:** edit drafts so they sound like your business.

✗ DON'T

- ✗ **Don't publish AI output unread.** A human always reviews anything public or sent to clients.
- ✗ **Don't use personal AI accounts for work.** Client data belongs inside your tenant's enterprise data protection.
- ✗ **Don't let AI make decisions about people:** hiring, performance, credit or complaints outcomes.
- ✗ **Don't use AI unsupervised for sensitive comms:** complaints, redundancies, safety incidents.
- ✗ **Don't roll out to everyone at once.** Pilot with a few champions, gather wins, then scale.
- ✗ **Don't assume Copilot saw a file.** If it can't access a document, it may answer from general knowledge instead.

2.5 Governance and responsible use in 60 seconds

Governance

Review who can access what across Microsoft 365 before rollout, define roles and permissions for Copilot, and assign an owner for AI decisions.

Privacy & security

Prompts and responses stay inside your tenant and are not used to train the models. Still, de-identify client details wherever possible and meet your Privacy Act and contractual obligations.

Responsible AI

Cover AI in your policies: approved uses, banned uses, human review, and how you talk about AI use with clients. Revisit as tools change.

Adopt in waves

Start with recaps and summaries now; move to proposals and data analysis next; automate whole workflows only once the basics are habits.

2.6 Useful links

Plans and pricing microsoft.com/en-au/microsoft-365/business **Adoption** Copilot Success Kit at adoption.microsoft.com **Free training** Copilot courses on **Microsoft Learn** and **LinkedIn Learning**

3.1 Which tool for which job

You don't have to pick a side. Most businesses land on a mix: Copilot for the work that lives inside Microsoft 365, Claude for the heavy writing and thinking. Both have a free way in, so let a month of real use decide.

	CLAUDE	MICROSOFT COPILOT
Strongest at	Long-form writing and thinking: proposals, reports, marketing copy, analysis, policy drafts	Work inside your files: meeting recaps, inbox catch-up, Excel analysis, first-draft decks
Where it lives	Its own app: web, desktop, mobile; connects to M365, Google, Slack, HubSpot	Inside Word, Excel, PowerPoint, Outlook, Teams and Edge
Free way in	Free plan at claude.ai	Copilot Chat, included with Microsoft 365 business plans
Paid entry point	Pro, about A\$26 to A\$31 / month (billed in USD)	Business Standard with Copilot, A\$35.20 / user / month ex GST
Give it first to	Whoever writes your proposals, marketing and client documents	Whoever lives in meetings, email and spreadsheets

3.2 Your first 30 days

WEEK 1 Try it on real work

- **Everyone picks two templates** from this guide and runs them on real work, using the free tiers.
- Team meeting: each person shares **one win and one frustration**.

WEEK 2 Set the rules

- Publish a **one-page AI use policy**: approved uses, banned uses, human review.
- IT tidies **SharePoint and OneDrive permissions** before any Copilot upgrade.

WEEKS 3-4 Pilot the paid tiers

- Upgrade **two or three people**: your heaviest writer to Claude Pro, your heaviest meeting-and-email person to a with-Copilot tier.
- **Track hours saved** against the licence cost, honestly.

DAY 30 Decide and scale

- Review results and **choose your paid mix**; roll out to the roles where it clearly paid for itself.
- Set a **monthly 15-minute share-around** so good prompts spread across the team.

Want a hand? Real Bytes helps Australian businesses set this up end to end: tenant and permission hygiene, licensing, team training and a day-30 review. blake@realbytes.com.au · realbytes.com.au