

Meet Your New AI Teammate



A manager's playbook for safely delegating to and reviewing Claude.



Stop treating AI like software. Start managing it like a teammate.

The fastest way to be disappointed by AI is to expect a traditional search engine. If you expect perfect, deterministic software, you will fail. If you expect an eager, highly capable junior teammate who needs clear instructions and careful review, you will unlock massive productivity.

The Teammate Spectrum

Claude (Your AI Teammate)

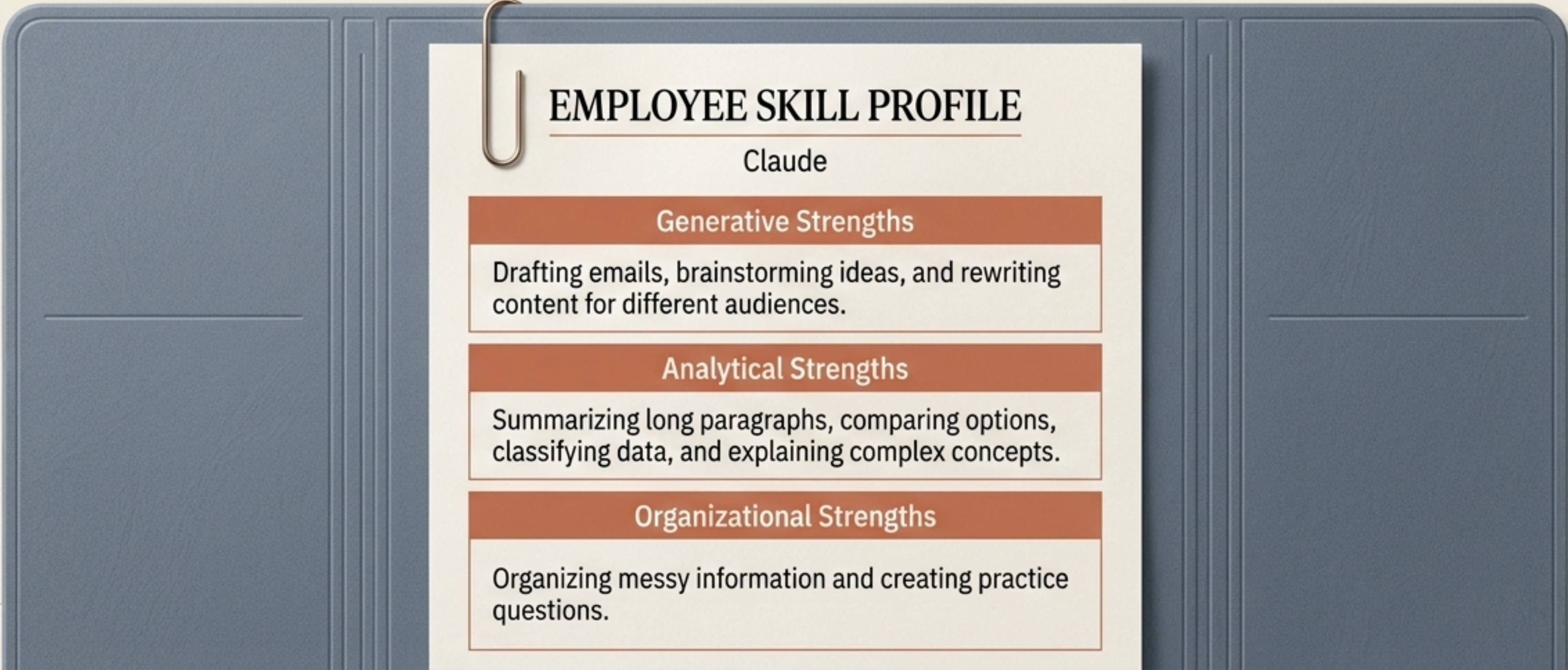


Requires exact code.
Outputs exact data.
100% factual retrieval.

Takes natural instructions.
Requires context.
Needs work reviewed.

Your new hire excels at heavy lifting and structuring messy information.

Treat Claude as an eager analyst ready to tackle the blank page. It operates with immense speed, turning raw ideas into structured drafts.



EMPLOYEE SKILL PROFILE

Claude

Generative Strengths

Drafting emails, brainstorming ideas, and rewriting content for different audiences.

Analytical Strengths

Summarizing long paragraphs, comparing options, classifying data, and explaining complex concepts.

Organizational Strengths

Organizing messy information and creating practice questions.

Brilliant but ungrounded: acknowledging the AI's natural blind spots.

Like any new hire, Claude lacks real-world grounding, deep company history, and your brand's unique intuition.

Internal Context

Cannot access internal private data, confidential business plans, or internal profit margins.

Nuance

Struggles to perfectly capture your brand's nuanced tone without heavy prompting.

Certainty

Cannot provide absolute factual certainty without human-verified sources.

Authority

Cannot make high-stakes promises to customers.

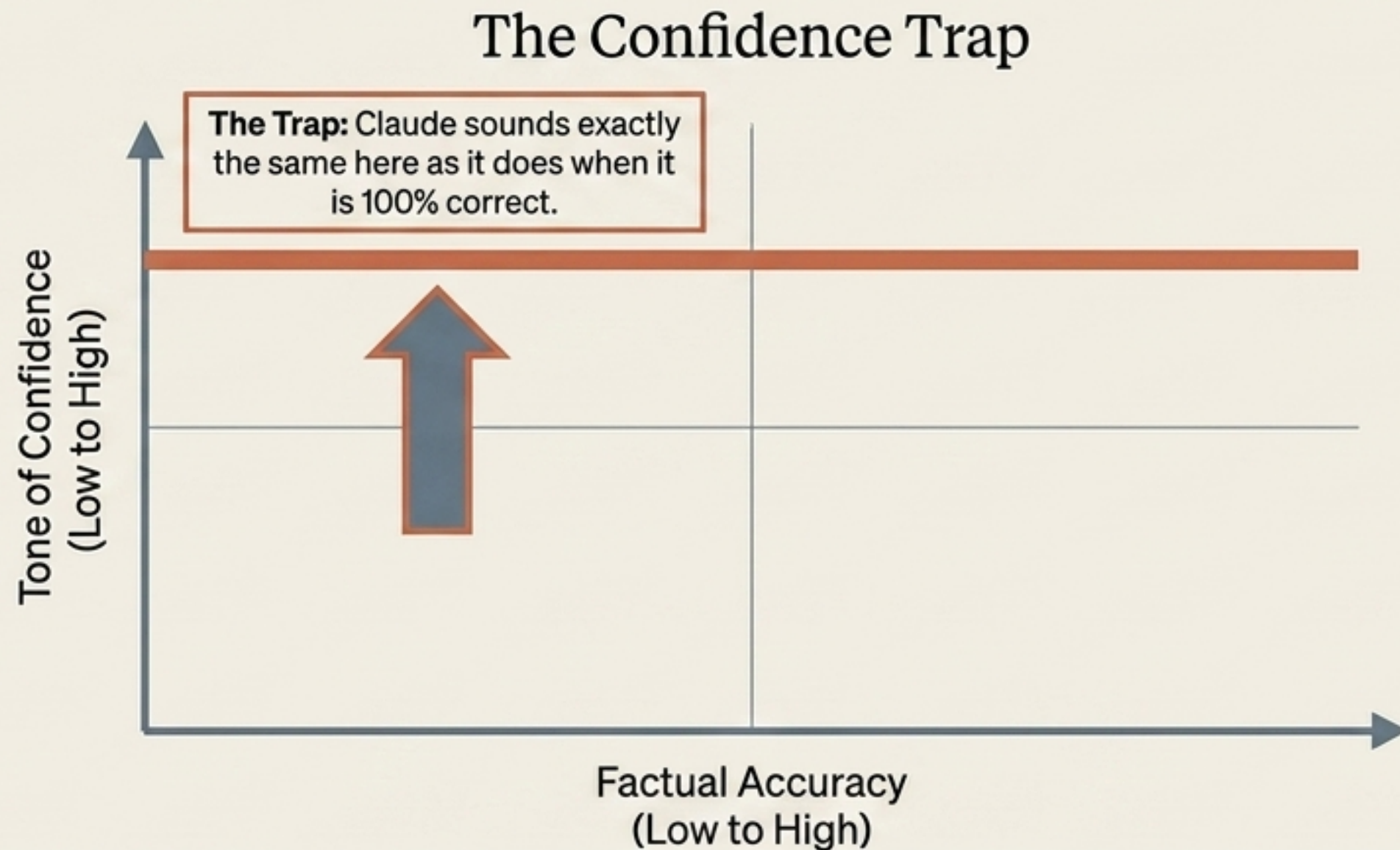
The Delegation Matrix clearly maps the boundaries of trust.

Effective management requires knowing exactly where autonomous execution ends and human ownership begins.

The Task Dimension	Claude's Zone (Autonomous Execution)	Human's Zone (Required Oversight)
Drafting & Ideation	Heavy Lifting (Executes first draft)	Provides initial direction
Facts & Figures (Names, Dates, Numbers)	Generates initial data	Verifies against trusted sources
Brand Tone & Nuance	Approximates tone	Polishes and finalizes
Customer Promises & Legal	DO NOT USE	Total Ownership (Writes from scratch)

The Confidence Trap: AI will answer authoritatively even when wrong.

A hallucination occurs when an AI gives an answer that sounds incredibly confident but is unsupported, outdated, or entirely made up. Confidence does not equal correctness.



Every raw draft must pass through a strict Verification Funnel.

Never trust important answers blindly. Use citations as evidence clues, then read the source.



Treat company data with zero trust by enforcing safe-use rules.

You wouldn't hand an intern the master passwords or private client files. Apply the same strict information security rules to Claude.

Do Not Paste

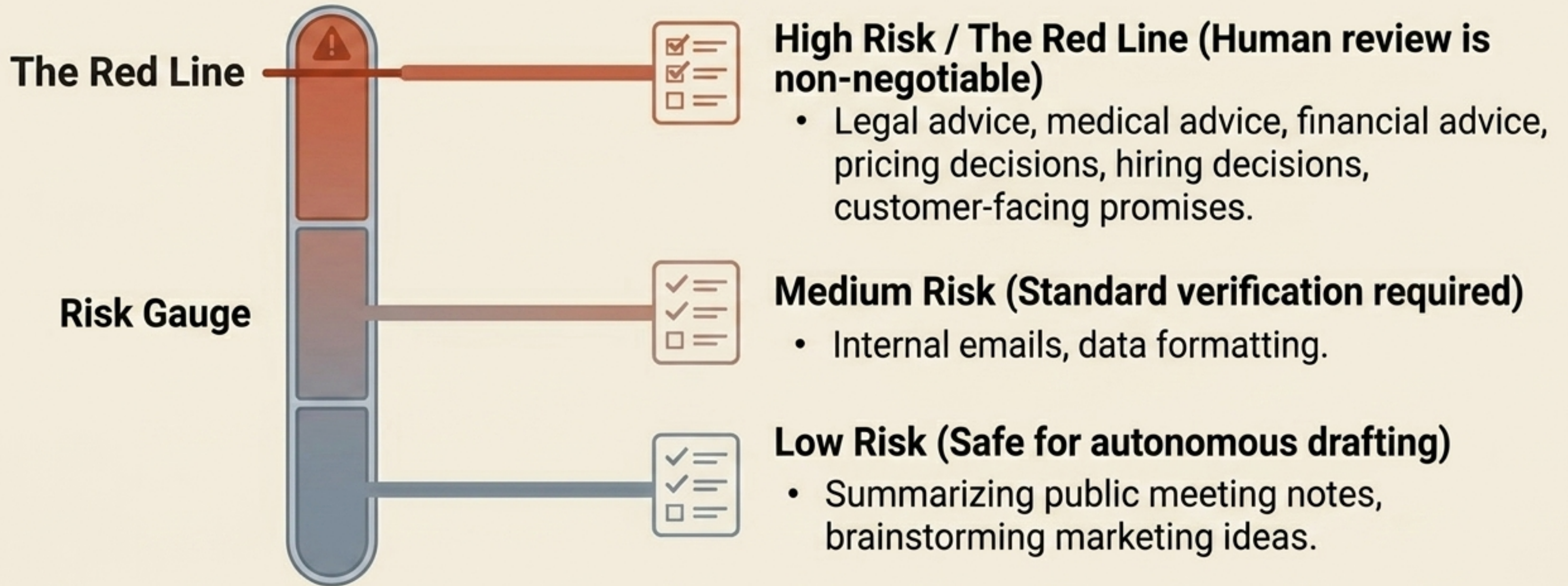
- ✗ Passwords
- ✗ API keys
- ✗ Private customer records
- ✗ Payment card info
- ✗ SSN/SIN
- ✗ Medical/legal documents
- ✗ Confidential business plans
- ✗ Internal profit/margin/markup data

Safer Alternatives

- ✓ Use fake sample data
- ✓ Remove private details
- ✓ Ask for a blank template
- ✓ Use generic placeholders (e.g., [CLIENT NAME])

High-stakes decisions demand absolute human oversight.

While Claude is an excellent sounding board, it cannot shoulder the liability of actions that could harm someone if wrong.



Your teammate cannot read your mind without the prompt formula.

A weak instruction ("Tell me about AI") yields a generic result. To delegate effectively, you must provide the complete architecture of the task.



Prompt Formula

Task: What exactly do you need done?

Context: What background information does the AI need?

Audience: Who is the final reader? (e.g., child, coworker, customer)

Format: How should it look? (e.g., table, checklist, summary)

Constraints: What are the limits? (e.g., under 100 words, no jargon)

A real-world workflow requires active coaching, not a one-time request.

The first draft is rarely the final draft. Good management means reviewing, refining, and steering the output.

Prompt

Give a clear instruction using the 5-part formula.

Read

Review Claude's initial answer critically.

Improve

Ask one specific follow-up to refine tone or structure.

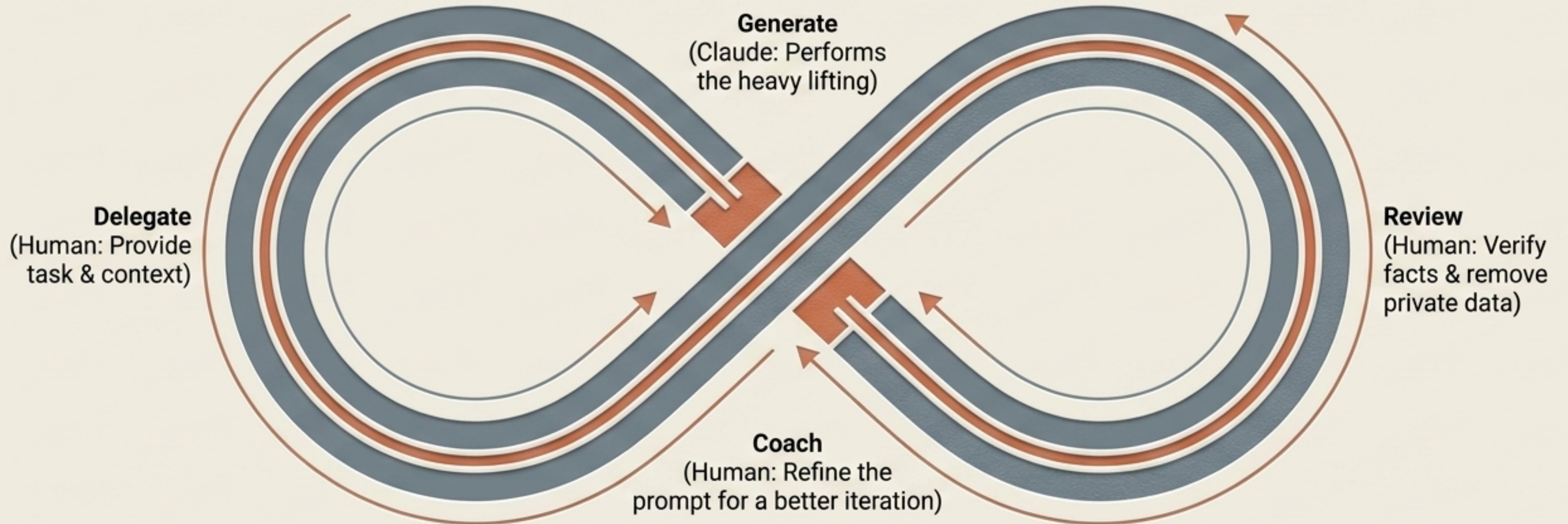
Review

Verify facts, names, and dates before final use.

True productivity emerges from the continuous Co-Intelligence Loop.

The highest quality of work is not produced by Claude alone, nor by the human alone.
AI doesn't replace the worker; it promotes the worker to a manager.

Output Quality = AI Capability x Human Verification



The AI Manager's Passport officially certifies your readiness to delegate.

By adhering to these core principles, you are ready to integrate Claude into your daily workflow safely and effectively.

- 1. I understand Claude is an assistant to be managed, not a flawless search engine.
- 2. I will always check exact dates, numbers, names, and facts.
- 3. I will protect private company and customer data by using placeholders.
- 4. I will take total ownership of high-stakes, customer-facing, and legal output.

