

How to use AI as a leader

A practical starting point for using the tools yourself and building AI competence across your team.

Start with the work

Use AI on a task that matters to you.

Make the review visible

Show what you accepted, changed and checked.

Bring the team along

Practise the same judgment on real tasks.

Proveo Team

The harsh reality

Many executives can describe their company's AI program in detail. They have approved the tools, funded pilots and asked teams to attend training. Yet the question "Show how AI helped with your work yesterday" can still be hard to answer.

That matters because the example set by a leader travels further than another memo about adoption. A team needs to see the work itself: a rough first draft, the questions that improved it and the point where human judgment took over.

Start with a task already on your desk. Get comfortable using AI in public, including showing where its answer was wrong. Then ask employees to do the same on tasks from their own roles.

How to think about AI as a leader

Build your own working setup. Pick a primary assistant and make it useful for a real initiative. Give it the documents, context and constraints that shape your work, within company policy. A generic empty chat will only get you so far.

Show the messy middle. A polished AI draft is a poor demonstration on its own. Show the prompt, the weak first answer and the change you made. That gives colleagues permission to question the tool instead of treating fluency as proof.

Aim for work that matters. Saving a few minutes is fine, but look at the decisions and handovers that slow other people down. A clear meeting follow-up or a better prepared customer response can be more useful than another draft sitting in a folder.

Keep judgment visible. AI can propose an answer; someone still needs to check the source, resolve uncertainty and decide whether it is ready to use. Make that review step explicit whenever the output affects a customer or a decision.

Make practice part of the job. Give the team a realistic case and watch the choices they make. What did they give the tool? What did they check? The answers tell you what to coach next, far better than a course-completion figure.

A place to start

Take the next note, brief or customer reply on your desk. Let AI make a first draft from your actual material. Mark what you checked, what you rewrote and why. That marked-up draft is something a team can learn from.

ILLUSTRATIVE CASE

THE SOURCE

A customer drawing has an unclear dimension.

THE AI DRAFT

"We can build it to the dimensions shown."

THE REVIEW

Clarify the dimension before sending the quote.

An executive AI stack

The tools below solve different problems. You do not need all of them. Start with an approved assistant you will use daily; add the others when there is a clear job for them.

TOOL	WHAT IT IS GOOD FOR
Claude	For work that lives across several documents. Keep the brief, earlier decisions and drafts in one project; ask it to find tensions in a strategy memo before rewriting it.
ChatGPT	For working through an idea in conversation. Use voice to think aloud, ask it to challenge two options, then turn the discussion into a first draft in a project.
Perplexity	For a first pass at external research. Ask who has published on a market or topic, open the cited pages and read the important ones before making a claim.
Microsoft 365 Copilot	For teams already working in Word, Outlook and Teams. Draft from a document, catch up on a thread or review meeting action items where the work already happens.
Granola	For meetings where the follow-up gets lost. Add brief notes during the call; let the app structure the discussion, then correct owners and commitments before sharing.
Wispr Flow	For capturing thoughts while they are fresh. Dictate a rough reply or project note directly into the app you use; cut the filler and check the wording afterward.
Zapier	For a repeated handoff between systems. Route an incoming request, add a review step and let a person approve before the next action runs.

Three workflows to try

Meeting follow-up: Turn Granola notes into checked decisions and named owners.

Weekly briefing: Collect sourced updates on one page and flag what needs a decision.

Customer reply: Draft from approved material; have the owner review it before sending.

Set up your AI workspace

A useful setup is small enough to use every day. Put one real project into your assistant before adding more tools.

- 1 Pick a primary assistant.**
Use an approved work account on laptop and phone.
- 2 Open a project for live work.**
Add the brief, source files, audience and constraints.
- 3 Add role context.**
Describe your goals, preferred tone and what remains undecided.
- 4 Set a source rule.**
Open the evidence behind claims that affect a decision.
- 5 Try voice or dictation.**
Capture a thought before polishing the text.
- 6 Choose a team task.**
Agree who will review the result before it is used.

A simple method for working with AI

Frame

State the task, audience and source.

Improve

Challenge the first answer; revise it.

Verify

Check the claims; make the final call.

Use cases worth your time

Writing and communication. Start with your own notes for a board update or customer reply. Have AI shape a draft, then restore the details and tone that only the sender can judge.

Decision support. Describe the choice, constraints and available evidence. Ask for competing options and the strongest objection; use the result to sharpen the discussion, not to outsource the call.

Meetings and follow-through. Turn notes into a short record of what was decided and who owns the next step. Check the names and dates with the people involved.

Research. Build a brief before a meeting, with links to the underlying material. Read the sources behind any claim that affects the conversation.

Team practice. Give colleagues a realistic case with a missing fact. Watch who catches the gap before using the AI answer.

Get your organization to use AI well

Ask one question about the work each week. Good questions lead to a task you can try and a decision you can review.

- Which weekly decision is delayed because someone has to assemble the same information again?
- Where would a fluent but wrong answer do the most damage?
- What does good AI use look like in sales, operations or management — and have we seen it?
- When the output is weak, is the problem the person's approach, the source or the review step?

Your 30-day plan

TIMING	FOCUS	WHAT YOU WILL HAVE
Week 1	Set up one assistant. Use it each day on writing or research.	A checked draft with your edits visible.
Week 2	Build one briefing or meeting follow-up that a colleague can use.	A shared output with an owner.
Week 3	Give a small team a realistic task. Watch prompts, checks and decisions.	Examples of what people do well and miss.
Week 4	Coach one gap. Run a comparable task and decide what to keep.	A one-page list of changes to make.

Guardrails

Do not delegate the final judgment. Read the output and check the source. **Use approved accounts.** Keep sensitive data in the right systems.