

Working With AI: Practices That Hold Up

Chris Adomaitis | Director of Pre-Sales, Global | Omilia
Take-home guide — try these after the session (or follow along live)

AI tools reward the people who configure them and punish the people who treat them as search engines. This handout is for a mixed room: habits first, then concrete try-at-home recipes. No model leaderboard required.

1. Match the tool to the job

Before you open anything, name the job:

- Thinking and drafting — a chat window is enough.
- A real file (deck, doc, sheet) — a tool that can create and hand you the file.
- Something that runs (small app, automation) — a coding-capable assistant; you do not need to be a programmer to get a working draft.
- Images and diagrams — an image tool when the output is visual.

Switch tools when the job changes — not because a headline shipped.

2. Configure it once

AI does not infer who you are. Tell it what is unique about your situation, how you like to work, and who you speak to (at least your manager and direct reports).

Ask it to interview you into a preferences note, then correct what it gets wrong. Define “good writing” or you get default AI noise. Save preferences in the tool and revisit them — stale instructions are worse than none.

My case: I am autistic. Written communication is a strength here. I process reactions with AI first, then choose the response. Preferences are where I encoded that.

3. Make it argue with you

- What is my purpose? Am I making an ask? If not, should I send this?
- Who exactly am I speaking to — name them.
- Ask “What would make this plan fail?” not “Is this a good plan?”

Say what the output must do: “something my manager can read in 90 seconds and know whether to escalate.”

4. Build what persists

Use projects or folders by initiative. Trust transformation; verify recall. When it errs, correct it and update the library so the error does not repeat.

5. Guardrails

- Never paste client data, recordings, PHI/PII, credentials, or unannounced commercial terms.
- Verify numbers, names, dates, citations, and anything with a consequence.
- Sanitize before you demo on a shared screen.

6. Eagle Bot on Grok Bot — a standing assistant

I run a standing assistant I call Eagle Bot inside Grok Bot (desktop + phone). It is not a one-off chat I abandon. It keeps context, helps turn overwhelm into a next move, and can watch streams I connect.

How I use it:

- One front door — I talk to Eagle Bot; helper bots can work underneath.

- Email / Slack when connected — ping only when a reaction (or silence) is worth it.
- Written lists I can open (tasks, people notes), not only chat memory.
- Meeting prep and follow-ups so I am not relying on memory alone.
- Phone notifications only from that assistant.

Try at home — three recipes

Each recipe: tool → use case → steps. Pick one this week. If I demo live, these are the same paths.

Recipe A — Preferences interview (any chat AI)

Tool: Claude (claude.ai) or ChatGPT — whichever you already have.

Use case: Stop getting generic answers; teach the tool how you work.

1. Open a new chat (or a new Claude Project).
2. Paste: “Interview me into a short preferences note: how I work, who I speak to, what good writing means for me, and what you must never do. Ask one question at a time. End with a preferences block I can save.”
3. Answer 5–10 questions. Correct anything wrong.
4. Save the preferences: Claude — Settings — Instructions (or Project instructions); ChatGPT — custom instructions / project memory.
5. Test: “Draft a reply to my manager asking for a decision by Friday — apply my preferences.”

Recipe B — One messy job end-to-end (Grok Bot + Eagle Bot)

Tool: Grok Bot app (Mac/Windows/iPhone) — create a bot you can name Eagle Bot (or any name you like).

Use case: Turn one real work pile into a next move and a file you can keep.

6. Install / open Grok Bot and sign in: <https://cursor.com/help/grok-bot/getting-started>
7. Create a bot. Name it. Give it one job in the description: e.g. “Help me prep meetings and clean messy threads.”
8. Attach one real artifact (email PDF, notes, deck draft). Prompt: “Here is my material for [meeting/topic]. Summarize what matters, list open asks on me, and draft my next message. Do not invent facts.”
9. Steer once: correct anything off. Ask for a one-page leave-behind or checklist as a file.
10. Optional: connect only the plugins you need (see Connect plugins help). Start with none.

Recipe C — Meeting takeaway in 15 minutes

Tool: Eagle Bot / Grok Bot, or Claude Project if you are not on Grok Bot yet.

Use case: Walk out of a meeting with actions, not vibes.

11. Before: “I have a 45-minute meeting about [topic] with [roles]. What should I listen for? Give me 5 questions.”
12. After: paste rough notes (no client secrets). “Extract decisions, open asks (owner + due if stated), and parking lot. Flag anything that needs my reply today.”
13. Send yourself the action list. If using Grok Bot, ask it to keep that list where you can reopen it.

Online help (bookmark these)

Grok Bot — Getting started: <https://cursor.com/help/grok-bot/getting-started>

Grok Bot — Mobile: <https://cursor.com/help/grok-bot/mobile>

Grok Bot — Connect plugins: <https://cursor.com/help/grok-bot/connect-plugins>

Grok Bot — docs hub (create bots, skills/routines): <https://docs.x.ai/grok-bot/get-started>

Claude — Projects: <https://support.claude.com/en/articles/9519177-how-can-i-create-and-manage-projects>

Claude — Personalization / instructions: <https://support.claude.com/en/articles/10185728-understanding-claude-s-personalization-features>

Start here tonight

Do Recipe A (15 minutes). Tomorrow, run Recipe B or C on one real pile. Habits beat features.