

CARAVAN[®]

THE CARAVAN

FIELD GUIDE

What to keep, what to try, and where
the trail goes next.

FOR ALUMNI OF THE WORKSHOP

THE CARAVAN FIELD GUIDE

Caravan was established in 2025 to help professionals process exponential intelligence and use it to improve their personal and professional lives.

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Actually, please share this guide.

Drafted with AI. Reviewed by humans.

thecaravan.ai

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FIELD NOTES

You're in good company.

"Your workshop yesterday unlocked something big for me! This. Is. So. Much. Fun. Seriously feel like a whole new world opened up."



Tanya Beck

"It was an 8-hour class, but to be honest, it felt like it flew by in about fifteen minutes. Now every morning I wake up excited to build something new."



Lee Handley

"Caravan's Claude Code training is that rare professional learning that engages you, sticks with you, and immediately changes how you work."



DJ Strickland

"It's not an exaggeration to say that a new professional world has been unlocked for me. I drove home with my mind racing about the possibilities."



Mark Conner

"Taking the Caravan AI training this month has very rapidly escalated my competence and confidence with AI tools."



Jake Waitzman

"Took the training. Blew my mind. I had no idea how far things had progressed and the programmatic capabilities that are now available."



Morgan Cole

START HERE

Take a breath.

It's okay — we don't expect you to retain all of the information. That's perfectly normal. This guide is here to help you adjust.

You've got a life and a job, and we understand that. Nobody needs you to keep up with every model release or remember every single thing from class. We want you to be a productive human — doing your work, spending time outside of work, and not hyper-focused on artificial intelligence. The big concepts are what matter. This guide lays them back out, and when something trips you up, it's here to help.

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Pack light. You already have what you need.

Words we used.

Agent	An AI that doesn't just answer — it does. It reads your files, makes a plan, does the work, and checks the result before showing you.
Checkpoint	An automatic save point behind every change. If something goes wrong, you can step back in time to just before it did.
CLAUDE.md	A file where you tell the AI who you are and how you like things done. Write it once, and every conversation starts already knowing you.
Connector (MCP)	A plug between the AI and the apps you already use. Once connected, the AI looks things up itself instead of you copy-pasting.
Context	Everything the AI knows about you and your situation. The more it knows, the better the help. With no context, every chat starts from zero.
Context window	The AI's short-term memory. It's big, but not endless — a very long conversation pushes the earliest parts out, like a whiteboard running out of room.
Eval	A test you write for the AI's work, so you don't have to hope it did well. Run the test and you know.
Instructions	The rules and preferences you've taught it: what format, what tone, what to never do. Good instructions mean you stop repeating yourself.

Words we used, continued.

Model	The engine doing the thinking. They come in different sizes, and you pick from a menu — page 7 shows how to choose.
Permission prompt	Before the AI changes a file or sends anything, it asks you first. You can say yes once, yes for the session, or no.
Plan Mode	A setting where the AI only thinks and proposes — it can't change anything. It's how you design before you build.
Project	A folder that holds all the files for one piece of work. The AI can only see inside the folder you've opened.
Prompt	Whatever you type to the AI. Clear prompts get clear answers; vague prompts get vague ones.
Skill	A workflow you've saved so it can run again with one command. Teach the AI a job once, and it remembers how forever.
Subagent	A helper the AI sends on an errand. It does one task, reports back, and disappears.
Token	The little pieces of text the AI actually reads and writes — a word is about a token or two. Costs and limits are counted in tokens.
Tools	The things the AI is allowed to do beyond talking: read files, search the web, send an email. No tools means no hands.

THE BIG IDEAS

The **ACTIVE** framework.

You heard this all day, and it's the one thing worth memorizing. When AI disappoints you, it's rarely the machine — it's usually one of six levers, and every one of them is in your hands.

A

AI. Know what the model can and can't do. It's the one lever you choose rather than improve — the other five are where your effort pays.

C

Context. Give it what it needs to know: your files, your role, your world. An assistant who knows nothing about you can only give generic help.

T

Tools. Connect it to where the work actually lives — your email, your spreadsheets, your systems. Talking is nice; doing is better.

I

Instructions. Teach your workflows once, as skills it can repeat. If you find yourself explaining the same thing twice, that's a sign.

V

Verification. Don't hope the work is right — check it. Reviews, tests, and a second look are what make delegation safe.

E

Empowerment. The more work AI does, the more your judgment matters — not less. You are still the point.

Occasional, ad-hoc AI use gets modest gains. Working the six letters deliberately is where the dramatic ones come from.

Which program do I open?

Claude comes in three forms, and they're all the same brain. The difference is how much it can reach — here's the situation each one is built for.

	Chat	Cowork	Code
What it is	The conversation window. You talk, it answers.	Claude working inside your files and everyday apps.	Claude with hands on the keyboard. It builds and runs real things.
Open it when	You're thinking something through, drafting, or asking questions.	The work lives in documents, spreadsheets, or your inbox — including automations on them.	You want to build an application, a website, or challenging software.
Think of it as	A brilliant colleague on the phone.	That colleague sitting at your desk with you.	That colleague doing the work while you review it.

The good news: nothing you learn is wasted. The same context, skills, and habits carry across all three — start in Chat and graduate at your own pace.

THE BIG IDEAS

Pick your model.

The situation: you're starting a task, and there's a little menu at the top of the window asking which model should do the thinking. The trade is always the same — speed for depth — and switching costs one click.

Model	What it's like	Pick it when
Haiku	The sprinter. It answers almost instantly.	The task is quick and low-stakes: a summary, a lookup, a first pass.
Sonnet	The daily driver. Speed and judgment in balance.	It's a normal workday. This is the default, and the default is right most days.
Opus	The heavyweight. Slower, and it thinks deeply.	The problem is genuinely hard: strategy, tricky analysis, work worth the wait.
Fable	The expedition. The most capable model yet — it plans, delegates to helpers, and checks its own work over long runs.	You're handing off a whole project — deep research or a big build — and you'd rather review finished work than supervise every step.

When in doubt: leave the default alone and get to work. Reach up the menu when a task deserves it; reach down when you're in a hurry.

THE BIG IDEAS

Know your colors.

Every task you hand to an AI gets a color, and the color answers one question: how closely does a person need to watch this work?

-  **Green — the AI runs the task on its own.** The stakes are low and the output is just for you. Check in when it suits you.
 -  **Yellow — the AI drafts, a person reviews.** The work goes somewhere that matters, so nothing ships until someone has looked it over.
 -  **Red — a person signs off before anything happens.** Money moves, customers see it, or real systems are involved — the AI still does the work, but a human makes the final call.
-

Before you build

Integrate first. Buy second. Build only when you must.

Does something already solve this? Connect the tools you have, buy what exists, and build only when nothing fits — then build the simplest thing that works.

Beware AI slop

AI slop is work that looks polished but says nothing — and the tells are easy to learn:

- “It’s not just X — it’s Y.” Every idea becomes a revelation.
- Lists of three, every time: crisp, confident, and empty.
- Em dashes — everywhere — like this.
- “Delve,” “seamless,” “game-changer,” “in today’s fast-paced world.”

Never send AI work out without reading it yourself. And yes — this guide is Yellow work: AI helped draft it, humans reviewed every page. Spot a tell we missed? Let us know.

Tips & tricks.

- 1 Have the AI interview you.** Facing a blank page? Don't write — answer. Tell it what you're trying to make and say “interview me first.” It asks the questions, you talk, and your answers become the document.
- 2 Delegate like you would to a person.** Give the same briefing you'd give a colleague — the goal, the audience, the deadline — then review what comes back, because something is always wrong, and finding it is the skill. Delegate, review, correct.
- 3 Do the prep work.** Every file you write about your business today is work you can hand off tomorrow. An hour spent writing down how things work at your company pays you back every week after.
- 4 Blame the briefing, not the model.** When an answer disappoints, ask “what did I fail to give it?” before “is the AI broken?” The missing piece is usually context, tools, or instructions — all things you control.
- 5 Climb the ladder.** Here's how a one-off becomes a system: do the task together in a chat, write down the standard for how it should be done, save the standard as a skill you can run with one command, then add a test so you can trust it. Session, standard, skill, eval — one rung at a time.
- 6 Leave a note for your future self.** Before you close the laptop, ask the AI to jot down what you did and what's next. Tomorrow's session starts warm instead of cold — and future-you says thanks.
- 7 Don't multitask too much.** It's tempting to have three AI tasks running at once, but many people overextend — and when they come back to a half-finished thread, the rhythm is gone. Multitasking is possible, but it's like working up to a sprint. You can't just go right back into sprinting.



CLIENT TESTIMONIAL

Case study: OHD.

OHD makes the respirator fit testing instruments that safety teams in more than 30 countries rely on. In April, their leadership brought their top ten people together for a full day of on-site AI training.

10

top people, one room

7

departments, one day

30+

countries use their instruments

Why they didn't train themselves

Their leadership put it simply: a team told to figure AI out on the side lands somewhere useful in six to nine months. They weren't willing to burn that time on a foundation they could get in a day.

What the day looked like

Surveys before the session, a context file built around OHD's products and workflows, and by afternoon the room had moved from chatting with AI to delegating real work inside their own systems.

"The automations, insights, and efficiencies we've already gained by using Claude throughout our organization are enormous. The Caravan training was just what we needed, and it has allowed us to move forward into this new world of AI with confidence."

Hunter Strickler · Chief Operating Officer, OHD

SERVICES FOR YOUR TEAM

Private company training.

Companies bring us in when adoption has stalled — people have tried the tools, but nothing built yet moves the needle.

We've trained finance, accounting, sales, marketing, HR, operations, IT, legal, creative, and executive teams — executive assistants to analysts to the C-suite. Nobody has to be technical.

- 1 We learn the business first.** Before we build anything, we talk to leadership about goals, workflows, and bottlenecks, and we review the SOPs, institutional knowledge, and regulatory requirements.
- 2 Every person gets their own curriculum.** Each attendee is surveyed before the session, and the exercises are built around their actual job — an accountant works on reconciliation while a sales lead works on prospecting.
- 3 Training day is hands-on, on real work.** A lead trainer and a technical guide spend the full day on site. People build automations and agents on the company's own data — and by the afternoon, they're showing each other what they've built.
- 4 Support continues after the day.** We stay on to monitor how the tools are being used, improve how the team collaborates with AI, and keep the systems working as needs grow.

What a team walks away with

- Working automations and agents built on real company data — tools people open the next morning, not demos.
- SOPs and institutional knowledge loaded into the AI system, instead of scattered across shared drives.
- A confident team — anxiety about being replaced becomes confidence about adding more value.
- A clear adoption plan: what to prioritize and which departments come next.

Book a team day — robert@thecaravan.ai

Governance, risk, and compliance.

Most companies tell us the same thing: “I don't know what I'm worried about with AI — and that's exactly what worries me.”

Inside most businesses, people are already using AI tools — whether anyone signed off or not. Data could be flowing to unvetted apps and overseas AI services right now, and most executives can't answer two simple questions: what data is going into these systems, and where is it going? Fewer still know how their own agreements say that data should be handled — who should have access to what. We help businesses find out, set guardrails, and keep watch, without slowing anyone down.

- **Free readiness assessment** — A 30–60 minute conversation with leadership and IT. No script, no cookie-cutter checklist. We help you figure out what actually keeps you up at night, then build a starting point tailored to your risk surface.
- **Visibility into shadow AI** — We set up monitoring that shows exactly what AI tools are in use across a business, what data is going into them, and where it's going — including traffic to services nobody even knew were in use.
- **Alerting on your terms** — A standard library of 15–20 proven alerts; you choose what's on. We define “rules of engagement” together — you decide what counts as hitting the fan, and your team keeps control of the trigger.
- **Ongoing strategy, not just reports** — Automated reporting plus regular check-ins where we surface anomalies, share what similar clients are seeing, and refine your policy as threats evolve — because governance is a living strategy, not a one-time document.
- **Proof your training investment worked** — Monitoring shows whether the workflows from training actually stuck, or people slipped back to old habits.

AI adoption doesn't end at training — it begins there. Start with the free assessment: robert@thecaravan.ai

THE TRAIL SO FAR

How we got here.

Eighty years of waypoints — walked slowly at first, then very fast at the end.

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- 1943** ■ Two scientists write the math for an artificial neuron.
 - 1950** ■ Turing asks whether a machine could pass for a person.
 - 1956** ■ A Dartmouth summer workshop names the field: artificial intelligence.
 - 1997** ■ Deep Blue out-plays the world chess champion.
 - 2011** ■ Watson wins Jeopardy! on live television.
 - 2012** ■ Deep learning takes off — machines start learning from examples, not rules.
 - 2016** ■ AlphaGo wins at Go, the game people said computers never would.
 - 2017** ■ The transformer arrives — the engine under everything you used in class.
 - 2020** ■ GPT-3 writes so well it startles its own makers.
 - 2022** ■ ChatGPT lands. A hundred million people start talking to a machine.
 - 2023** ■ Claude arrives.
 - 2025** ■ AI stops just answering and starts doing — files, tools, whole tasks.
 - **Caravan is formed!**
 - 2026** ■ In July, Caravan crosses 1,000 professionals and 100 companies trained.
 - 2030** ■ **Things get weird. Pack accordingly.**

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EVERYTHING FLOWS

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