

Days: 1

Prerequisites: Participants should have previously taken The Modern AI Professional, and they must have (at a minimum) a **Claude Pro** account.

Audience: This course is best suited for business professionals, project managers, operations personnel, marketing and communications teams, analysts and administrators, team leads and managers, or anyone seeking to increase productivity using AI.

Description: Most professionals have experimented with AI. Few have learned how to make it a reliable part of their daily workflow.

Working Smarter with Claude AI is a hands-on, instructor-led workshop that teaches users how to leverage Anthropic's Claude platform in completing research, writing, analysis, planning, and performing recurring work processes faster and with greater accuracy. This course is ideal for organizations that have standardized use of Claude or are evaluating alternatives to Microsoft Copilot, ChatGPT, or other AI platforms.

Through a realistic business scenario taken from a fictional company called Summit & Spoke, participants learn how to move beyond simple prompting and begin using Claude as a true workplace assistant by building reusable workspaces, creating custom skills, managing projects, automating recurring activities, and integrating Claude into document creation workflows.

Course Objectives: By the end of this course, participants will learn to:

- Navigate the Claude interface confidently
- Write effective prompts for business work
- Ground Claude in organizational files and documents
- Create reusable Artifacts for ongoing work
- Delegate longer tasks using Cowork
- Automate recurring activities using Scheduled Tasks
- Build and use custom Claude Skills
- Create Projects that maintain business context
- Use Claude for research, planning, writing, and content creation
- Apply Claude within Word, Excel, and PowerPoint workflows when available
- Determine when to use Chat, Projects, Skills, Cowork, or Automation

OUTLINE:

COURSE OVERVIEW AND INTRODUCTIONS

The instructor will spend the first part of the day getting to know participants and discussing what will take place during the workshop. Participants will review specific steps for retrieving and using class files for the day, as well as review specific vocabulary reminders for prompt building taken from The Modern AI Professional.

MODULE 1: GETTING STARTED WITH CLAUDE

- Claude interface overview
- Settings and personalization
- Memory and conversation management
- Understanding Claude models
- Best practices for organizational use

MODULE 2: PROMPTING AND GROUNDING

- Writing effective prompts
- Providing business/organizational context
- Uploading and referencing files
- Fact verification and source validation
- Creating reusable workflows

MODULE 3: ARTIFACTS AND STRUCTURED OUTPUTS

- Understanding Artifacts
- Creating reports and documents
- Building reusable templates
- Collaborating on generated content

Working Smarter with Claude AI

MODULE 4: COWORK AND DELEGATED WORK

- Long-running tasks
- Research workflows
- Monitoring delegated work
- Reviewing and refining outputs

MODULE 5: SCHEDULED TASKS AND AUTOMATION

- Recurring reports
- Information monitoring
- Automated summaries
- Establishing repeatable processes

MODULE 6: DESIGNING WITH CLAUDE

- Visual content generation
- Graphics and creative assets
- Brand consistency considerations
- Business use cases

MODULE 7: BUILDING CUSTOM SKILLS

- Skill design fundamentals
- Creating reusable business processes
- Standardizing outputs
- Instruction engineering

MODULE 8: CLAUDE PROJECTS

- Creating project workspaces
- Managing project knowledge
- Maintaining context across multiple tasks
- Team-oriented AI workflows

MODULE 9: OFFICE PRODUCTIVITY WORKFLOWS

- Claude with Excel
- Claude with Word
- Claude with PowerPoint
- End-to-end workflow demonstrations

MODULE 10: CHOOSING THE RIGHT AI APPROACH

- Chat vs. Skills vs. Projects
- Automation decision framework
- Identifying high-value business use cases
- Building a personal AI adoption plan

WORKSHOP WRAPUP

At the conclusion of the workshop, participants will have an opportunity to ask final questions and complete a training satisfaction survey.