

# AI for the Workplace with Claude

Go from zero experience with Claude AI to a fully configured, personalized workflow you can use immediately at work by learning effective prompting, organizing Projects, building a context system with Claude Cowork, and connecting Claude to tools like Slack, Google Drive, Gmail, Excel, and PowerPoint.

For more information, visit  
<https://www.creativelive.com/classes/ai-workplace-claude>



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## Course Outline

### Module 1: Getting Started with Claude AI

- Explain how Claude works in plain language.
- Identify the model tiers, plans, and key parts of the claude.ai interface.
- Practice starting a first conversation with Claude.

### Module 2: Prompting Fundamentals & Working with Files

- Identify the core parts of an effective prompt, including context, task, format, constraints, and examples.
- Apply prompting across writing, summarization, analysis, research, and creative problem-solving.
- Work with images, PDFs, spreadsheets, screenshots, and handwritten notes in Claude.

### Module 3: Projects — Organizing Ongoing Work

- Explain how Projects use custom instructions, knowledge bases, and RAG to organize ongoing work.
- Write effective Project instructions for real workplace tasks.
- Create a Project using real work documents.

### Module 4: Artifacts, Skills, and Memory

- Create reusable deliverables with Artifacts.
- Customize how Claude communicates using Skills, custom instructions, and persistent context with Memory.
- Apply usage management tips to extend plan value.

### Module 5: Intermediate Prompting & Advanced Features

- Use role-based prompting, chain-of-thought, and multi-step workflows.
- Apply advanced features such as web search, Extended Thinking, and the “You Ask Me” technique.
- Practice advanced prompting with real work scenarios.

### Module 6: Claude vs. Other AI Tools

- Compare Claude with tools such as Copilot, Gemini, and ChatGPT.
- Choose the right tool for different types of work.

- Recognize data privacy considerations and organizational AI policies.

### **Module 7: Introduction to Claude Cowork**

- Explain what Claude Cowork is and how it differs from claude.ai.
- Read, write, and manage files from the desktop environment.
- Complete a first Cowork task.

### **Module 8: Building Your Context System**

- Build three foundational files: about-me, brand-voice, and working-style.
- Distinguish between Global Instructions and Folder Instructions.
- Use the AskUserQuestion workflow to improve context and outputs.

### **Module 9: Guardrails, Permissions, and Safe Use**

- Configure file access controls, network egress, and privacy settings.
- Recognize prompt injection risks and mitigation strategies.
- Set up safety settings for secure use.

### **Module 10: Connectors, Claude for Chrome, and Office Add-Ins**

- Connect tools such as Slack, Google Drive, Gmail, and more through MCP.
- Use Claude for Chrome, Claude for Excel, and Claude for PowerPoint.
- Build a multi-tool workflow across connected applications.

### **Module 11: Plugins and Scheduled Tasks**

- Install domain-specific Plugins for functions such as Data, Marketing, HR, Finance, and Project Management.
- Use slash commands and recurring automations.
- Create a Scheduled Task and test a Plugin workflow.

### **Module 12: Industry Applications**

- Apply Claude across role-specific scenarios in Data, Marketing, HR, Operations, Project Management, and Finance.
- Complete practical workflows using real files.
- Adapt Claude workflows to different job functions.

### **Module 13: Capstone — Build Your Personal Claude System**

- Audit job tasks and identify high-value Claude use cases.
- Configure a personal Claude system and connect relevant tools.
- Run a complete end-to-end workflow that produces a real deliverable.

### **Module 14: Wrap-Up and Next Steps**

- Review Claude's limitations and available resources.
- Create a Week 1 action plan for applying what was learned.
- Identify next steps for continued use and improvement.