Vol. 2 · Deep Dive edition

Claude *at Work*

free to share!

The step-by-step edition: walkthroughs, worked examples and exercises for getting real, finished work out of Claude.

MIAN SHAFIQ · SHAFIQ.PK



engineer by trade,
business by necessity

Hi again, I'm Shafiq.

Volume 1 was for engineers. This one is for everyone else: sales, marketing, ops, founders, managers. Anyone who writes, plans, researches and reports for a living.

The goal: less chatting, more finished work. Things you can send, share and reuse.

This is the deep dive: steps, examples and an exercise at every stop. No coding needed.

How to read this edition

Same ten stops as the short version, with the "how" filled in. Four kinds of slide:

STEP BY STEP

Numbered steps

Follow along in your own Claude account.

WORKED EXAMPLE

A real chat

What you type, and what Claude does.

WRONG / RIGHT

Side by side

The common habit, and the better one.

TRY IT

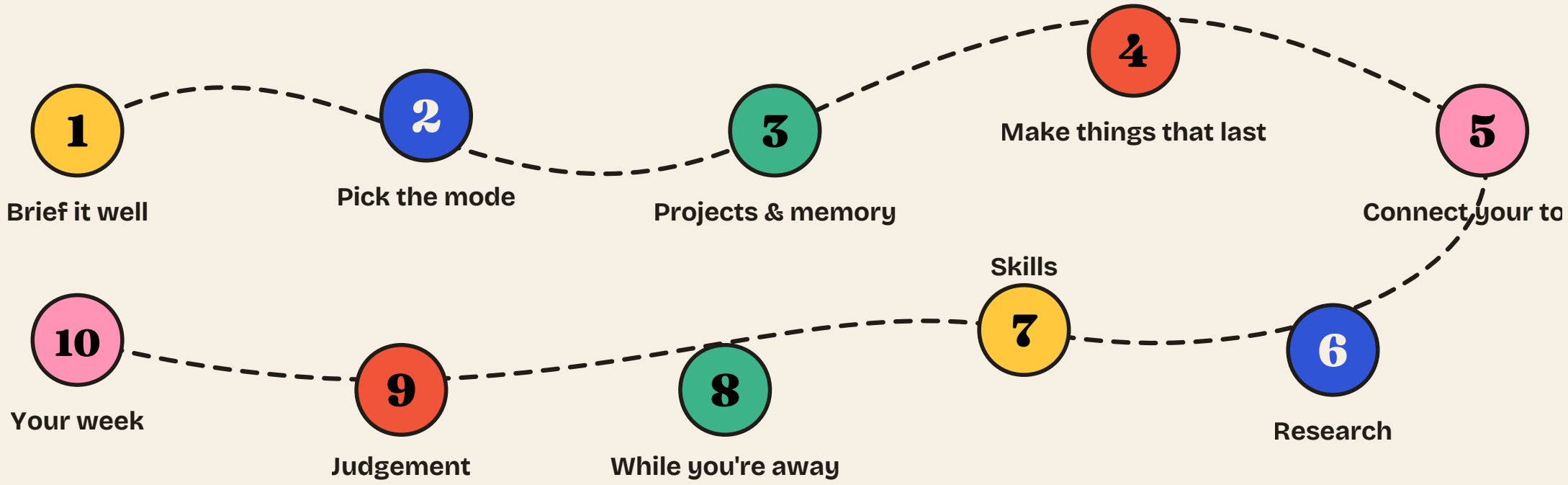
Your homework

One exercise per stop, with a "done when".

menus move around now and then. If a button isn't where I say, search the help centre for its name.

The route

Ten stops. Do the first three this week; they change everything else.



Ten minutes of setup

Works on the web (claude.ai), the desktop app and the phone app. Your chats and projects follow you everywhere.

on a company plan, your admin decides which of these you can switch on

1. **Tell it about you:** Settings › Instructions for Claude. Your role, your company, how you like answers.
2. **Let it make files:** Settings › Capabilities › turn on Create and edit files.
3. **Check memory:** Settings › Memory. See what it knows; switch it on or off.
4. **Connect your day:** + in the chat box › Connectors › add Gmail and Calendar.
5. **Make your first project** for the client or job that takes most of your week (stop 3).

1

a sales story...

"Write a sales email for our POS software" got me something any company could have sent.

Then I gave it three real customer conversations, our price sheet and who we were writing to. The drafts started sounding like us.

Claude is only as specific as your brief.

Brief it well

Brief it like a smart new colleague

Clever, fast, and knows nothing about your company yet. Four things help.

1 · GOAL

What's it for?

"So the client signs the renewal", not just "write an email".

2 · AUDIENCE

Who reads it?

A busy shop owner? A CFO? Your team? Tone follows.

3 · CONTEXT

What it can't guess

Past emails, prices, the backstory. Attach, don't describe.

4 · SHAPE

What "done" looks like

Length, format, an example you like.

The magic sentence

"Ask me questions before you start."

Claude asks what it needs, often as clickable options. Two minutes of answers saves three rounds of "no, not like that".

you **Draft a proposal for the warehouse client. Ask me questions first.**

claude A few quick ones:

1. Their main pain: cost or speed?
2. One price, or three options?
3. Formal, or friendly-formal?
4. Any deadline to mention?

Same email, two briefs

× THE USUAL

```
Write a follow-up email to a client who hasn't
paid.
```

You'll get a polite, generic template. Then you'll spend ten minutes making it sound like you.

✓ THE BRIEF

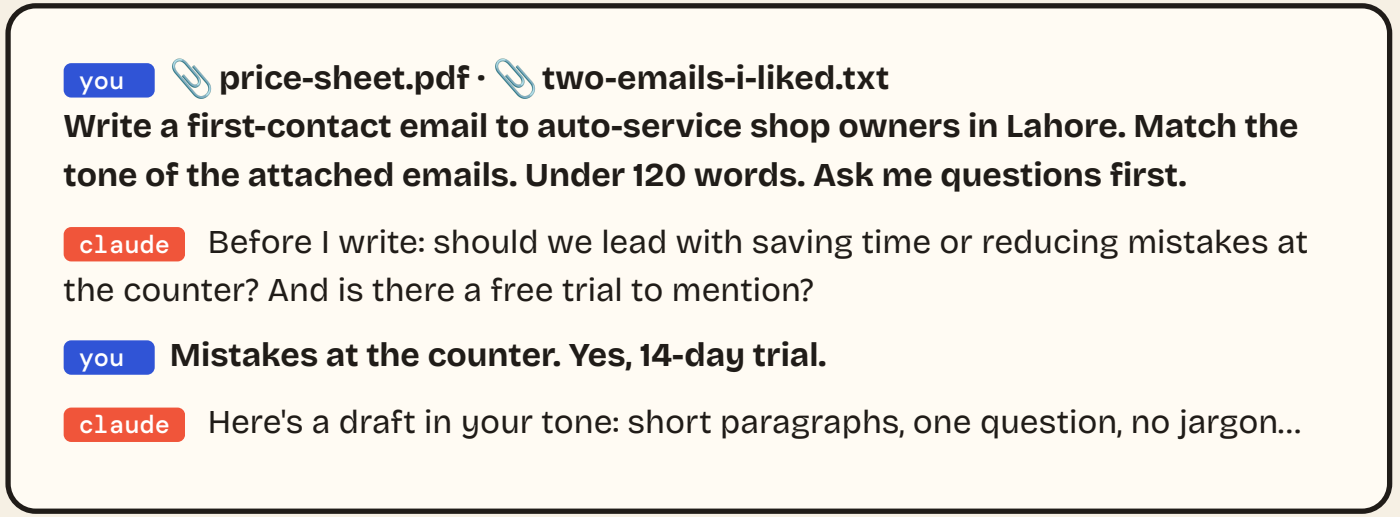
```
Goal: get paid this week without hurting the
relationship. To: Ahmed, owner of a 3-branch
service shop, prefers WhatsApp-style short
messages. Context: invoice attached, 45 days
overdue, he paid late once before but always paid.
Shape: under 80 words, warm, one clear ask, a date.
```

the second takes 40 seconds longer to write. It saves you three rewrites.

Show, don't describe

Two real examples of your writing teach tone better than ten adjectives.

attach files with + or just drag them in



Giving feedback that works

Treat the first draft as a draft. Then edit it like you'd coach a colleague.

× VAGUE

```
make it better
more professional
hmm, not quite
```

Claude guesses again, and often changes the parts you liked.

✓ SPECIFIC

```
Keep paragraph 2 exactly as is.
Cut the adjectives in paragraph 1.
Subject line under 6 words.
End with a question, not "let me know".
```

Say what to keep, what to change, and why.

Re-brief something you wrote this week

Use a real email or post you already sent, so you can judge the difference.

Try it

1. Write a four-part brief: goal, audience, context, shape.
2. Attach one example of writing you like.
3. End with "Ask me questions first."
4. Give one round of specific feedback.

Done when: the result is something you'd send with no more than light edits.

2

Four ways to ask

Same chat box, very different jobs. Pick the lightest one that fits.

PLAIN CHAT

Just ask

Drafting, rewriting, brainstorming.

WEB SEARCH

Look it up

Prices, news, "who runs X now".

EXTENDED THINKING

Think harder

Tricky plans, numbers, logic.

RESEARCH

Investigate

Many searches, a report with sources.

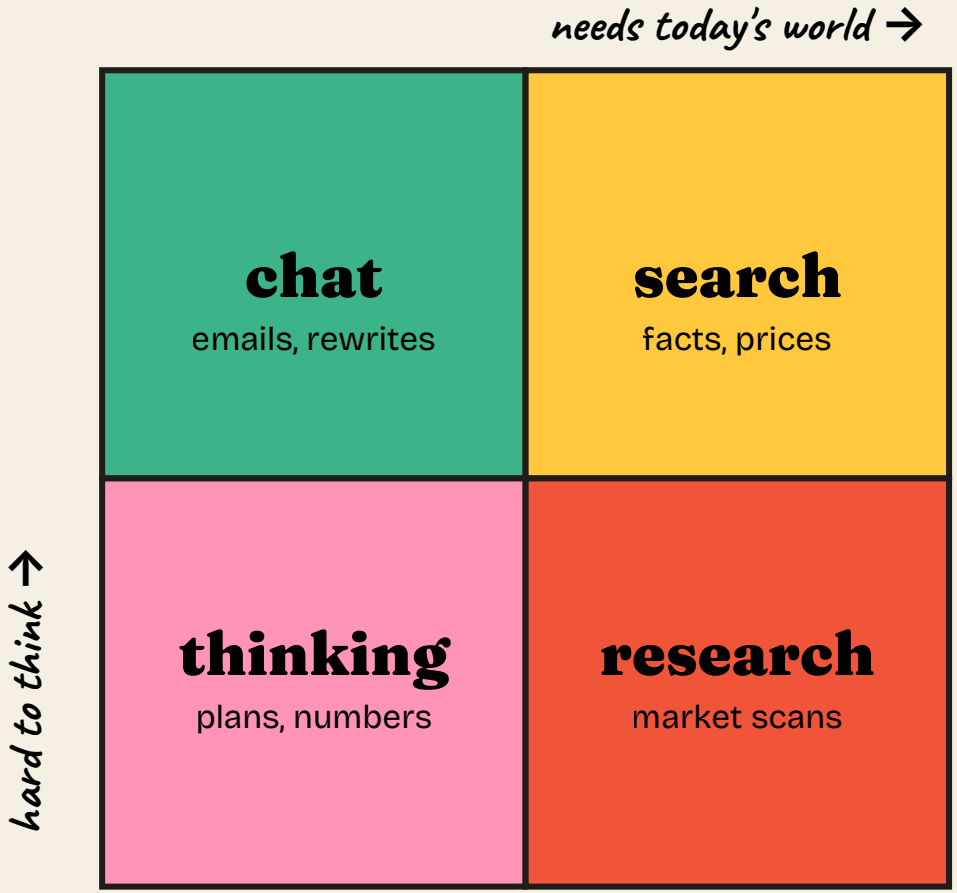
Pick the mode

Models: Opus 5.5 for serious work, Sonnet 5.5 for everyday speed, Haiku 5.5 for quick jobs, Fable 5.2 for the hardest problems. Research uses more of your plan, so save it for real questions.

Which one, when?

Ask yourself two questions: does the answer depend on today's world? And is it hard to think through?

Most everyday writing needs neither. Don't pay for horsepower you don't need.



Switching modes in practice

You rarely need to touch the settings. Asking in plain words usually works.

1. **Need today's facts?** Just ask: "Search the web for current courier rates in Pakistan."
2. **Hard thinking?** Turn on extended thinking, or say "take your time, think it through".
3. **Big question?** Turn on Research, or say "please use the research tool to..."
4. **Choose the model** from the model menu. Opus for serious work, Sonnet for speed.

One question, four ways

The fastest way to build your instinct for which mode to use.

Try it

1. Pick a real question: "Should we raise our prices next quarter?"
2. Ask it in plain chat. Then with web search. Then with thinking. Then with Research.
3. Note which answer you'd actually act on, and how long each took.

Done when: you can say in one sentence when each mode is worth it, for your work.

3

how I actually work...

I keep one project per client. Every chat starts already knowing them.

Their brief, their tone, past proposals, the price list. I set it up once, and never explain the backstory again.

Projects & memory

A project is a *room* for one piece of work

INSTRUCTIONS

How to behave

"You're helping our sales team. Friendly, never pushy. Prices in PKR."

FILES

What to know

Price list, brand guide, past proposals, the client's brief.

CHATS + MEMORY

What happened

Every chat inside builds on the same context, and the project keeps its own memory.

Projects work on every plan (Free gets up to five). On Team and Enterprise you can share one with colleagues as **view** or **edit**.

Set up a project in five minutes

one project per client, product or big piece of work

1. **Projects › + New Project.** Name it after the client or job.
2. **Set project instructions:** who you are here, who it's for, the tone and the rules (template on the next slide).
3. **Add files with +**: the brief, price list, brand guide, two or three past pieces of work you're proud of.
4. **Start a chat inside it** and test: "Summarise what you know about this client."
5. **Fix the gaps.** Wrong or missing? Update the files or instructions, not the chat.

Project instructions you can copy

Short is better. Five to ten lines that would change the answer.

put facts in files, and behaviour in instructions

project instructions

```
Who I am here: account manager for a
cloud POS product for auto-service shops.

Audience: shop owners. Busy, practical,
read on their phones.

Tone: warm, direct, no jargon. Short lines.

Rules:
- Prices only from price-list.pdf, in PKR.
- Never promise features not in features.pdf.
- Always end with one clear next step.

When unsure: ask me before writing.
```

Memory: it remembers, and you're in charge

Mention that a deadline moved, and the next chat knows. Say "remember this" to save something on purpose.

See and edit everything in **Settings › Memory**. Delete what you don't want kept.

REMEMBERS

Your role, projects, the people you work with, how you like things written.

👻 INCOGNITO

The ghost icon starts a chat that isn't saved to history or memory.

PROJECT MEMORY

Each project keeps its own. Client A never leaks into client B.

Take charge of memory

Memory is on by default on personal plans. On Team and Enterprise, the owners decide.

1. **Look:** Settings › Memory. Everything is listed under Topics.
2. **Fix:** open a topic, edit it, or delete what's wrong or private.
3. **Teach:** in any chat, "Remember that our financial year starts in July."
4. **Separate:** on a project's page, turn off Use account memory to keep it fully apart.
5. 👻 **One-off:** the ghost icon starts an incognito chat. Nothing is saved.

Build your busiest project

The client, product or job that eats most of your week.

Try it

1. Create the project, with instructions from the template.
2. Add 3–5 files that you'd hand a new colleague.
3. Ask it to summarise what it knows. Fix the gaps.
4. Do your next real task for that client inside it.

Done when: you stop typing the backstory into new chats.

4

Stop copying answers out of the chat.

Ask for the **thing itself**: a doc, a deck, a sheet. It stays editable, shareable, and Claude can keep working on it with you.

e.g. When I hand an intern a task now, the spec is a living doc we both edit, and Claude edits it too.

Make things that last

Seven kinds of finished work

Just ask for one in any chat. Everything you make is saved in the Artifacts tab.

DOCS

Living documents you write together

SLIDES

Decks from notes or reports

SHEETS

Spreadsheets with real formulas

DATA

Dashboards and charts

DESIGN

Visuals, mockups, one-pagers

WHITEBOARDS

Sticky-note boards to rearrange

MOTION

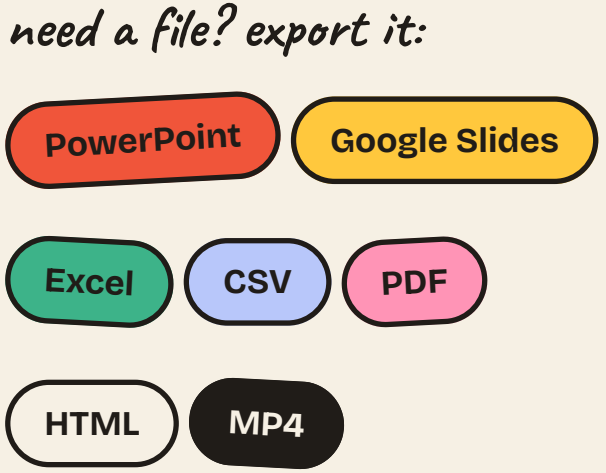
Short animated pieces

which ones you get depends on your plan and your admin

Private until *you* share

A new artifact is only visible to you. Share a link when it's ready, and work on the same doc, deck or sheet with your team and Claude.

On Team and Enterprise plans, links stay inside your organisation unless an admin allows outside sharing.



From messy notes to a deck

One conversation: notes, then a doc, then slides. Each one stays editable.

ask for the type by name: "a Doc", "Slides", "a Sheet"

you 📎 **meeting-notes.txt Turn these into a Doc: decisions, owners, dates.**

Doc "Q1 planning: decisions" · 4 sections

you **Good. Make the timeline a table, and bold anything overdue.**

Doc updated · table added · 2 items bolded

you **Now turn it into 6 Slides for Thursday's client call.**

Slides "Q1 plan" · 6 slides

claude Done. Slide 4 has the timeline. Want me to add speaker notes?

Edit, share, export

You can edit it yourself or ask Claude. Mix both freely.

1. **Small fix?** Click into the doc, deck or sheet and type, like any editor.
2. **Big change?** Ask: "Make slide 3 a chart of the monthly numbers."
3. **Share** a link when it's ready. It's private to you until then.
4. **Need a file?** Export to PowerPoint, Excel, PDF and more.
5. **Find it later** in the Artifacts tab.

Answer in the chat, or a thing to keep?

✓ FINE IN THE CHAT

Quick answers you'll read once.

- "What's a polite way to say no?"
- "Explain this clause to me."
- A one-paragraph message to paste.

✓ MAKE IT AN ARTIFACT

Anything you'll edit, share or come back to.

- Proposals, reports, policies → **Docs**
- Budgets, trackers → **Sheets**
- Pitch, review, training → **Slides**
- Weekly numbers → **Data**

Retire one copy-paste habit

Think of something you rebuild by hand every week or month.

Try it

1. Ask Claude for it as an artifact: a Doc, Sheet or Slides.
2. Make two edits yourself, and two by asking.
3. Share the link with one colleague.
4. Next time, open the same artifact and ask for this week's version.

Done when: the weekly rebuild is a two-minute ask.

5

every Monday morning...

"What did I promise people last week, and what's due?"

With Gmail and Calendar connected, Claude reads the threads and meetings and gives me a list, with links. Two minutes instead of twenty.

Connect your tools

Connectors: your apps, your permissions

Connect Gmail, Calendar, Drive, Slack, Notion and many more. Claude can only see what you can see.

By default, Claude asks before every action it takes in a connected app. Keep it that way until you trust the workflow.

1. **+** in the chat box › **Connectors**
2. **Manage connectors**, then pick one and sign in
3. Just ask: "Find the latest invoice thread with the printer vendor."

on Team & Enterprise, an owner turns connectors on first

Five connector prompts I use every week

GMAIL

"Which emails from clients this week still need a reply from me? Oldest first."

CALENDAR

"Prep me for tomorrow: who's in each meeting and what we last discussed."

DRIVE

"Find last year's proposal for the logistics client and list what changed since."

GMAIL → DRAFT

"Draft replies to the three oldest. I'll review them in Gmail before sending."

ALL TOGETHER

"What did I promise people last week, and what's due?"

Stay in control

Connected doesn't mean unsupervised. Three dials to know about.

no connector for your tool? custom connectors can be added too.

1. **Per chat:** + › Connectors. Toggle on only what this chat needs.
2. **Per action:** by default Claude asks before each action. Read what it's about to do, then approve.
3. **Per tool:** in settings, allow some actions (read, search) and block others (send, delete).

Your Monday morning, automated-ish

Start with read-only questions. Add drafts once you trust it.

Try it

1. Connect Gmail and Calendar.
2. Ask: "What did I promise people last week, and what's due?"
3. Check three items against your inbox. Were they right?
4. Ask for draft replies to two of them. Edit, then send yourself.

Done when: Monday catch-up takes minutes, not an hour.

6

Research you can check

Research mode runs many searches that build on each other, across the web and your connected apps, and comes back in minutes with **citations**.

true story: when a job platform's listings vanished from Google's job search, Research pulled together the current rules with sources. I checked every one before we touched the code.

Research

Read a report like an editor

CLICK 3 SOURCES

Spot-check

Open the citations behind the three claims you'll repeat.

ASK FOR DOUBT

"What's uncertain?"

Ask which findings are weak, old or contested.

CHECK THE DATE

Fresh enough?

Prices and rules change. Ask for the date of each source.

Research is on paid plans and needs web search turned on. It uses your allowance faster, so save it for questions that deserve it.

A research brief that gets a useful report

Research is only as focused as your question. Give it a decision to inform.

connectors in the mix? start research on the web or the desktop app

research brief

Decision: should we launch our POS in Karachi next quarter?

Find out: number of auto-service shops, main competitors and their prices, any licensing rules.

Sources: prefer official and recent (last 12 months). Flag anything older.

Output: 1-page summary, a table of competitors, and a "what we still don't know" list.

Run and check a research report

Most of the value is in the last two steps.

1. **Make sure web search is on.** Research needs it.
2. **Turn on Research** and paste your brief.
3. **Let it run.** It takes minutes. Go do something else.
4. **Open three citations** behind the claims you'll repeat to others.
5. **Ask:** "Which findings are weakest, oldest, or based on one source?"

Answer a question your boss asked

Or a client, or yourself. A real decision with real stakes.

Try it

1. Write a brief with the template: decision, find out, sources, output.
2. Run Research.
3. Spot-check three sources, and ask for the weakest findings.
4. Turn the result into a one-page Doc.

Done when: you'd defend every number in it if someone asked "where's that from?"

7

Your best way of doing it, saved.

A skill is a written-down workflow Claude follows every time: your report format, your audit checklist, your brand voice.

e.g. I run SEO audits for half a dozen websites. The checklist is a skill, so every report has the same shape, and nothing gets skipped.

Skills

What a skill looks like

A folder with one text file, `SKILL.md`. Zip it, then upload it in **Customize › Skills**.

Claude uses it whenever the **description** matches your request. Keep that line clear, and under 200 characters.

built-in skills already make Word, Excel and PowerPoint files

weekly-report/SKILL.md

```
---
name: weekly-report
description: Turns my notes into the
  Friday team report. Use when I paste
  weekly notes or ask for "the report".
---
## Format
1. Three wins, one line each
2. Numbers vs last week, as a table
3. Blockers, with an owner each
4. Next week's top three

Tone: plain, upbeat, no jargon.
Max one page.
```

Make your first skill

shortcut: ask Claude to write the SKILL.md for you from a good example

1. **Turn on** Settings › Capabilities › Create and edit files. Skills need it.
2. **Write SKILL.md** in a folder with the same name, e.g. `weekly-report/SKILL.md`
3. **Zip the folder.**
4. **Customize › Skills › + › Create skill › Upload a skill**, and pick the zip.
5. **Test it:** paste this week's notes and say "the report, please". Tweak, re-upload, repeat.

Six skills worth writing

Anything you do the same way every time, and want done well every time.

BRAND VOICE

Your words, banned words, tone by channel.

PROPOSAL

Your sections, pricing table, terms.

AUDIT CHECKLIST

SEO, website, process, compliance.

WEEKLY REPORT

Wins, numbers, blockers, next.

MEETING NOTES

Decisions, owners, dates. Always.

CUSTOMER REPLY

Your policy, your tone, your limits.

Bottle your best habit

On a Team or Enterprise plan, you can share skills with colleagues. That's where they really pay off.

Try it

1. Pick something you explain the same way every time.
2. Show Claude your best past example. Ask it to write a SKILL.md from it.
3. Upload it, then use it three times.
4. Fix what it gets wrong. Re-upload.

Done when: the output looks like your best day, every day.

8

Hand it a task. Go to your meeting.

Claude can now take on longer, multi-step jobs and finish them on its own: in the background, on a schedule, even in your browser.

e.g. For a small home-food brand with no ad budget, a scheduled task drafts the week's Instagram posts every Sunday evening. I just review and post.

While you're away

Two helpers that work on their own

SCHEDULED TASKS

Every Monday at 9

Recurring jobs that run in the cloud, even when your computer is asleep. They can use your connectors and skills. Results wait for you under **Scheduled**.

CLAUDE IN CHROME

Clicks for you

A browser extension that reads, clicks and navigates sites like vendor portals and dashboards that have no connector. You can even record a workflow once for it to repeat.

Start with sites you trust. Skip banking and anything with passwords you wouldn't share. Confirm anything that pays, sends or deletes.

Set up a scheduled task

It runs in the cloud on its schedule, even when your laptop is asleep.

1. **Get it right by hand first.** Do the task once in a normal chat until the result is good.
2. **Ask in plain words:** "Every Sunday at 7pm, draft next week's 5 Instagram posts using the brand-voice skill."
3. **Check the details** Claude confirms: time zone, what it can use, what it will produce.
4. **Review the runs** under Scheduled in the sidebar.

Claude in Chrome, safely

For sites with no connector: vendor portals, dashboards, old internal tools.

Browser tasks use more of your plan than chat. It works in Chrome only, not other browsers or phones.

1. **Install** "Claude in Chrome" from the Chrome Web Store and sign in.
2. **Allow one trusted site** to start. Add more as you learn.
3. **Give a clear task:** "Download last month's invoices from the vendor portal and list the totals."
4. **Repeat it?** Record the workflow once, and Claude learns the steps.

Hand off one weekly chore

Pick something boring, low-risk and regular.

Try it

1. Ideas: a Monday inbox summary, weekly social drafts, a Friday numbers check.
2. Do it by hand once with Claude. Fix the brief.
3. Schedule it. Review the first three runs carefully.
4. Keep "send" and "pay" as steps you do.

Done when: it runs for a month and you only ever review.

9

Claude drafts. *You* sign.

Whatever goes out under your name is yours: the numbers, the names, the promises. Treat Claude like a brilliant assistant whose work you always read before it leaves the building.

Judgement

Five rules I never break

1

Check every number and name before it goes out.

2

Never paste passwords, card or bank numbers.

3

Read before approving any send, pay or delete.

4

Web pages can lie. Hidden text can carry instructions.

5

Sensitive topic? Use an incognito chat.

and if your company has an AI policy, read it. Admins can switch features on and off.

Risky habits and safe ones

× RISKY

- Pasting a figure from Claude straight into a client deck
- Sharing passwords "so it can log in"
- Approving actions without reading them
- Letting it act on instructions found inside a web page or email

✓ SAFE

- Asking "where's that number from?" and opening the source
- Signing in yourself; Claude never needs your password
- Reading every send, pay and delete before approving
- Treating page and email text as information, not orders

Run your own fact-check

Build the editor's habit before it matters.

Try it

1. Take something Claude wrote for you this week that had facts or numbers.
2. Ask: "List every factual claim here and where each came from."
3. Check the three that matter most.
4. Read your company's AI policy, if there is one.

Done when: checking is a reflex, not a chore.

10 A week with Claude

MON

"What did I promise last week?" across mail and calendar.

TUE

Brief, questions, then a proposal as a Doc.

WED

Research a market question, and spot-check the sources.

THU

Turn the doc into Slides for the client.

FRI

The weekly-report skill, plus next week's scheduled tasks.

the pattern: brief → make → check → reuse

Three briefs to copy

EMAIL

```
Goal: …
To: who, what they care about
Context: attached thread
Shape: under 100 words,
one ask, a date
Ask me questions first.
```

PROPOSAL

```
Client: project files
Their pain: …
Options: 3 tiers, prices
from price-list.pdf
Output: a Doc, 2 pages,
then 6 Slides
```

REPORT

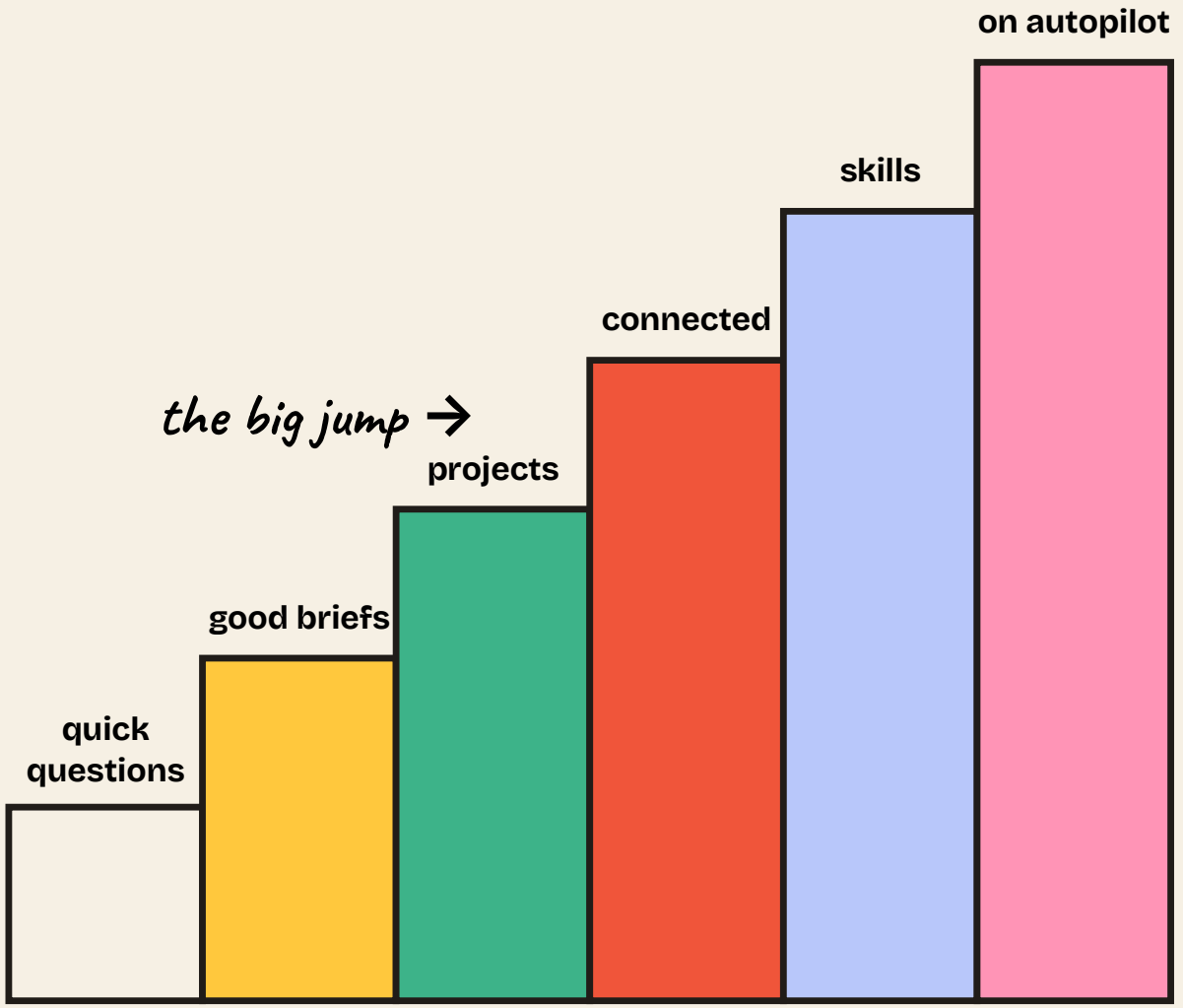
```
Data: attached sheet
Reader: my manager, 2 min
Show: 3 wins, trend
vs last month, risks
Output: 1-page Doc +
one chart
```

save the ones you use most as skills, and you'll never type them again

Where are you on the ladder?

Most people stop at step two: good answers in a chat window. The real time savings start at projects and keep compounding.

Climb one step a week.



Pin this one

GOOD BRIEFS

Goal · audience

Context · shape

"Ask me questions first"

Attach, don't describe

Show an example

WHERE THINGS LIVE

Projects: one per client

Settings › Memory

Customize › Skills

+ › Connectors

Artifacts tab

PICK THE MODE

Chat: writing

Search: today's facts

Thinking: hard logic

Research: with sources

👻 Incognito: sensitive

BEFORE IT GOES OUT

Numbers checked

Names checked

Sources opened

Tone read aloud

You'd sign it

Now go make something.

Pick one stop. Do its "try it" on real work today. Tomorrow, the next.

Mian Shafiq is a technology leader, software engineer and AI practitioner with over 25 years of building software, products and teams across recruitment, fintech and SaaS.

The Field Manuals: **The Claude Code Field Manual** · **Claude at Work** · **Claude for the Company** (next) · **Building on Claude**

Free to share. Not affiliated with Anthropic. Checked against Anthropic's help centre, November 2026. Features vary by plan and admin settings.

shafiq.pk



yes, a real human reads every message

Questions? Comments? *Wins?*

Tell me what saved you time, what didn't work, and what Volume 3 should cover.

EMAIL

talk-to-a-human@shafiq.pk

X / TWITTER

@shafiq

LINKEDIN

in/phpgurru

WEB

shafiq.pk