Vol. 2 · for business power users

Claude *at Work*

free to share!

A friendly guide to getting real, finished work out of Claude: briefs, projects, docs, research and tasks that run while you're away.

MIAN SHAFIQ · SHAFIQ.PK



engineer by trade,
business by necessity

Hi again, I'm Shafiq.

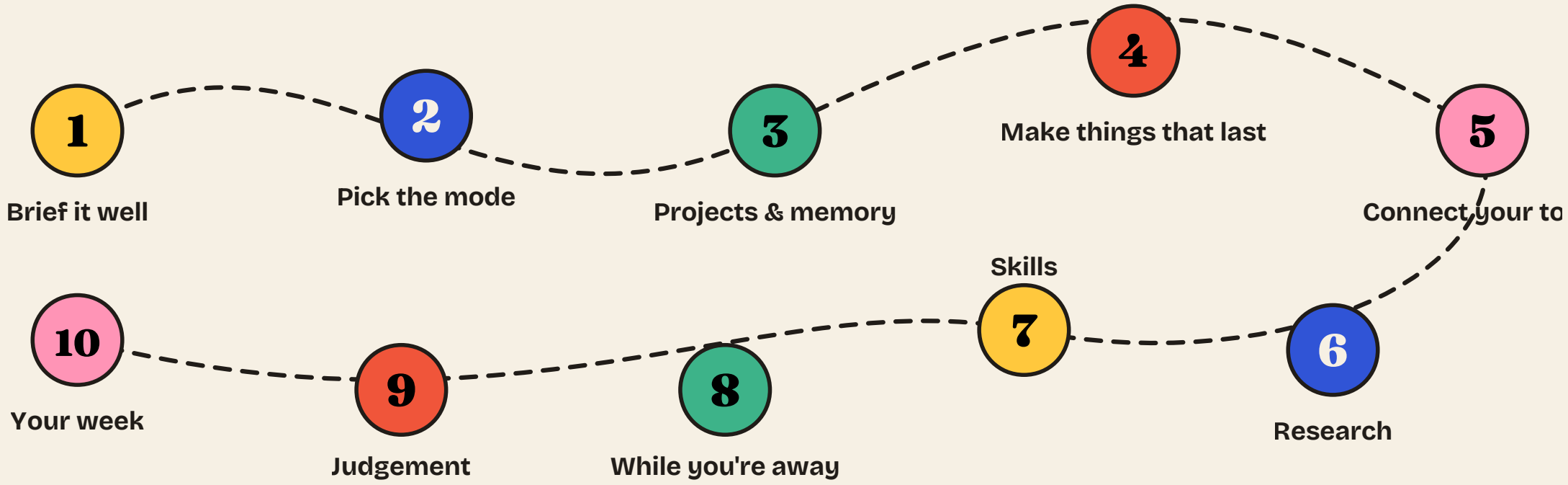
Volume 1 was for engineers. This one is for everyone else: sales, marketing, ops, founders, managers. Anyone who writes, plans, researches and reports for a living.

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

One idea per slide. About 20 minutes. No coding needed.

The route

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



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?

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.

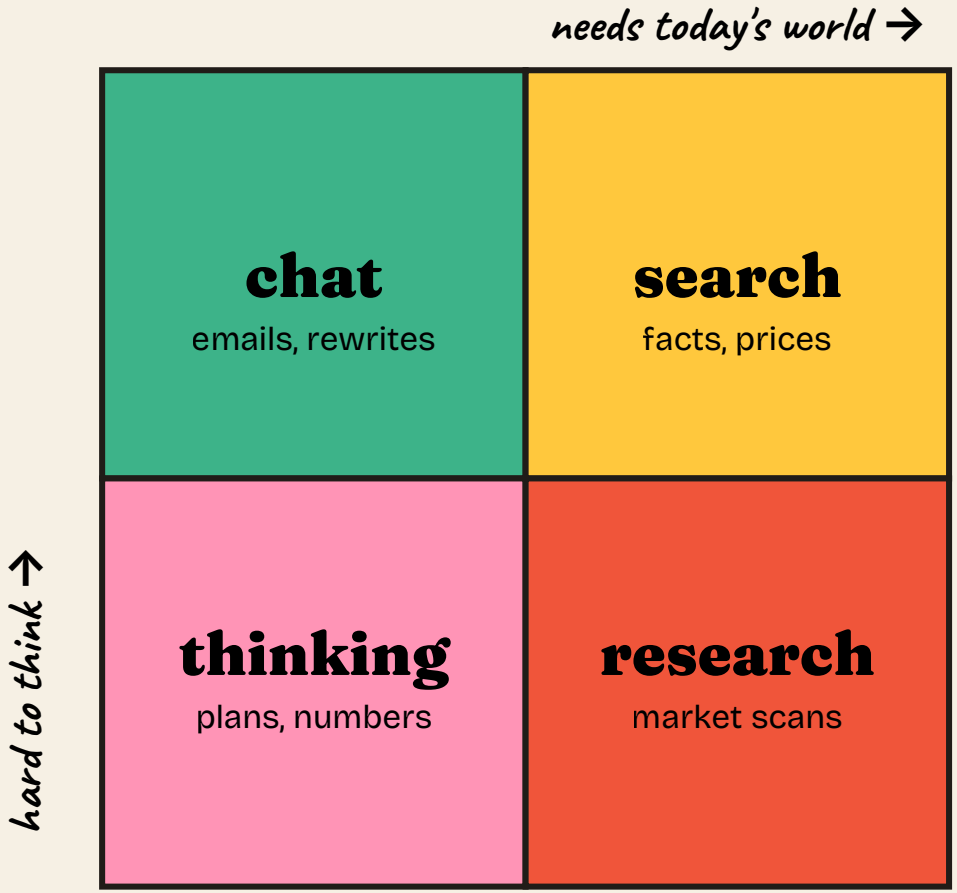
Pick the mode

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.



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**.

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.

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

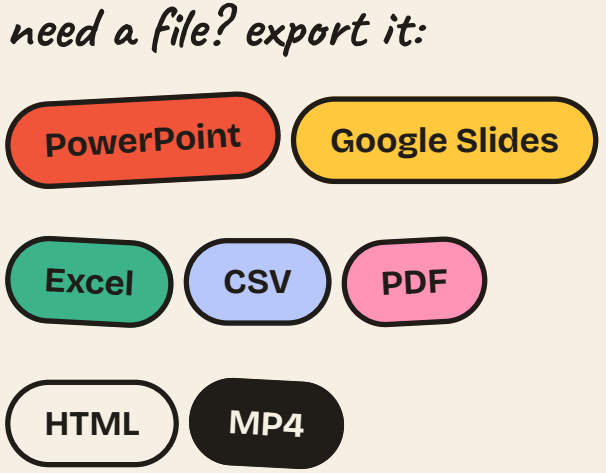
Short animated pieces

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.



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

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.

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.
```

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.

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.

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

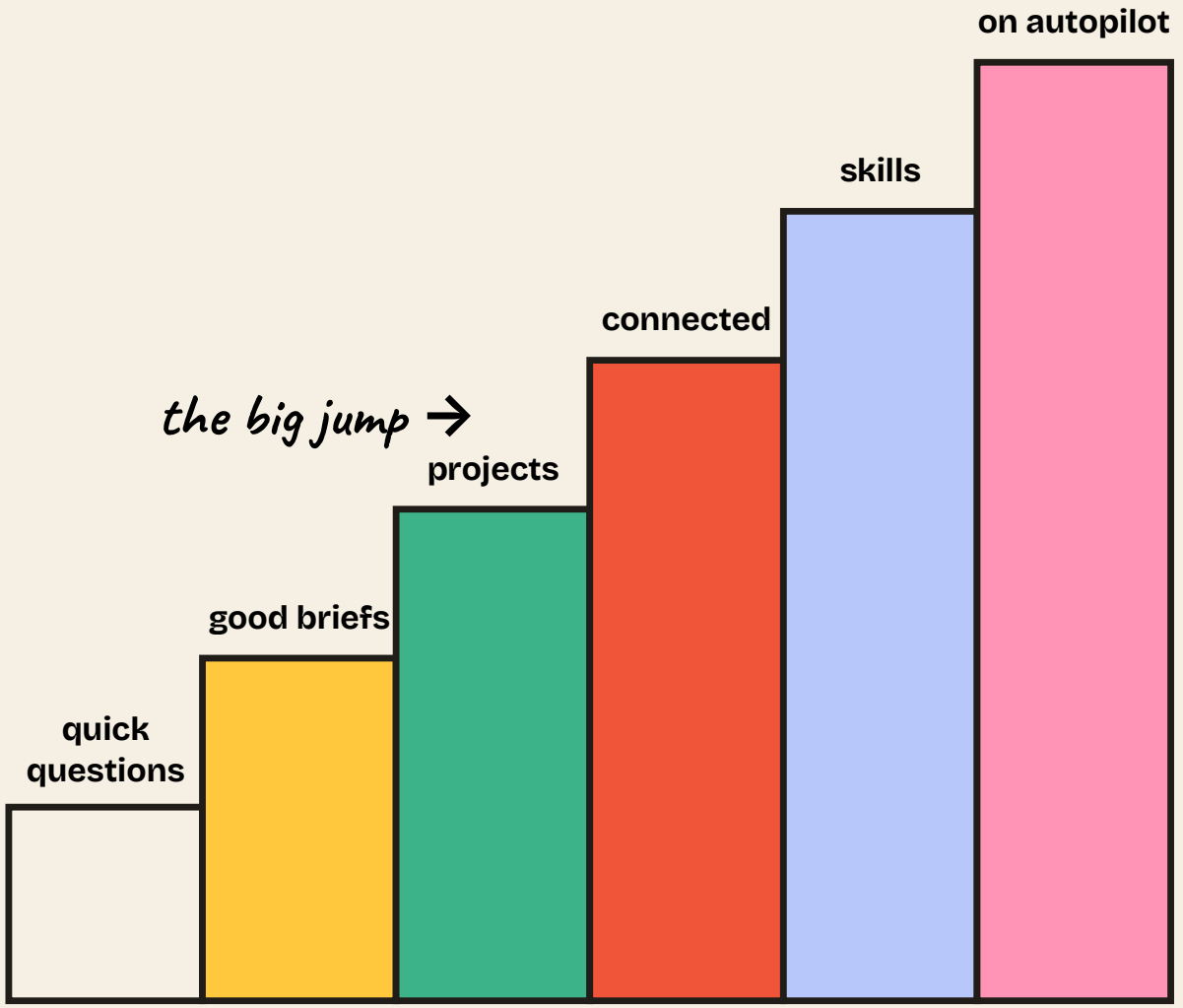
The weekly-report skill, plus next week's scheduled tasks.

the pattern: brief → make → check → reuse

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. 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