Local Enterprise Office
Let's talk business

The Marketing Crowd

Claude

HOW TO USE CLAUDE FOR DIGITAL MARKETING

(BEGINNERS GUIDE)

What we will cover

About Claude

- What is Claude?
- What makes Claude different?
- The three main areas within Claude: Chat, CoWork and Code
- Free and paid versions of Claude

Claude Chat: Elements that are similar to Chat GPT and Gemini

- Fast and thinking models, personalisation and projects

Claude Chat: Key features you should understand

- Usage limits
- Skills

Claude CoWork – Demonstration of how to use this AI Agent

- How to install it in your PC
- Overview of the navigation
- Ways you can use CoWork

Anthropic is the company that created Claude



Anthropic (The company behind Claude) was founded by former OpenAI researchers who wanted to focus heavily on **AI safety and alignment**.

Amazon is one of the major investors in Anthropic.

Their messaging consistently emphasises:

- Responsible AI
- Lower hallucination rates
- Careful reasoning
- Transparency
- Controllable behaviour

About the Anthropic / Claude brand



Their emphasis is on Safety first rather than rushing to develop *AIs* that could threaten humanity

They operate with high integrity

In Feb 2026 they refused to give the Pentagon access to their model unless they agreed that it wouldn't be used for surveillance and AI weapons.

This has led to a surge in adoption in the US where people admire an AI company that has high integrity

To compare with Chat GPT & Gemini

Chat GPT = Versatile and fast innovation
Gemini = embedded into the Google ecosystem
Claude = Careful, structured, analytical, safe

Why is it called Claude?



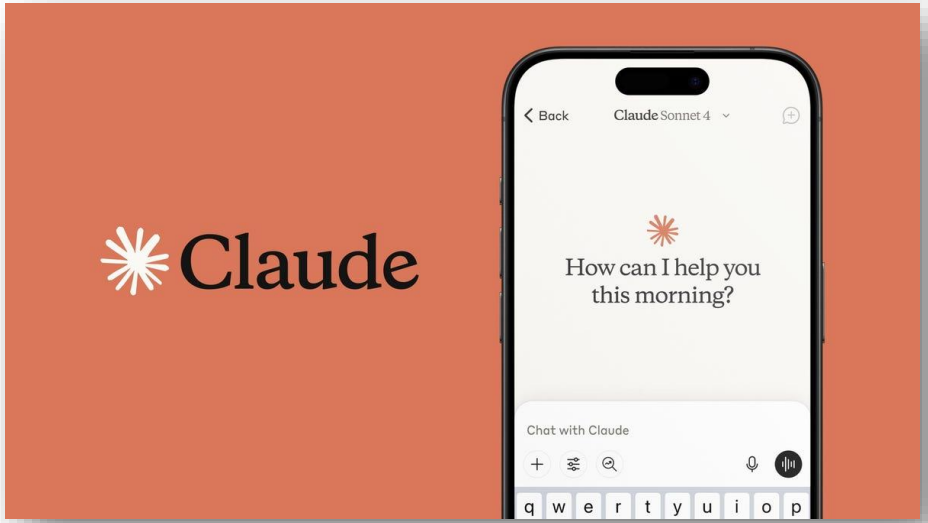
Claude is named after one of the pioneers who made the digital world (and AI) possible.

Claude Shannon was the mathematician and engineer who laid the foundations for how digital communication works today — how information is measured, transmitted, and processed. Modern AI systems are built on many of the principles he helped establish.

Why Anthropic chose the name:

- To reference the scientific roots of AI and computing
- To position the AI as thoughtful and research-driven
- To reflect a focus on intelligence and reasoning rather than just chat in simple terms:

What makes Claude different



What makes it Different?
Why should you use it in your marketing?

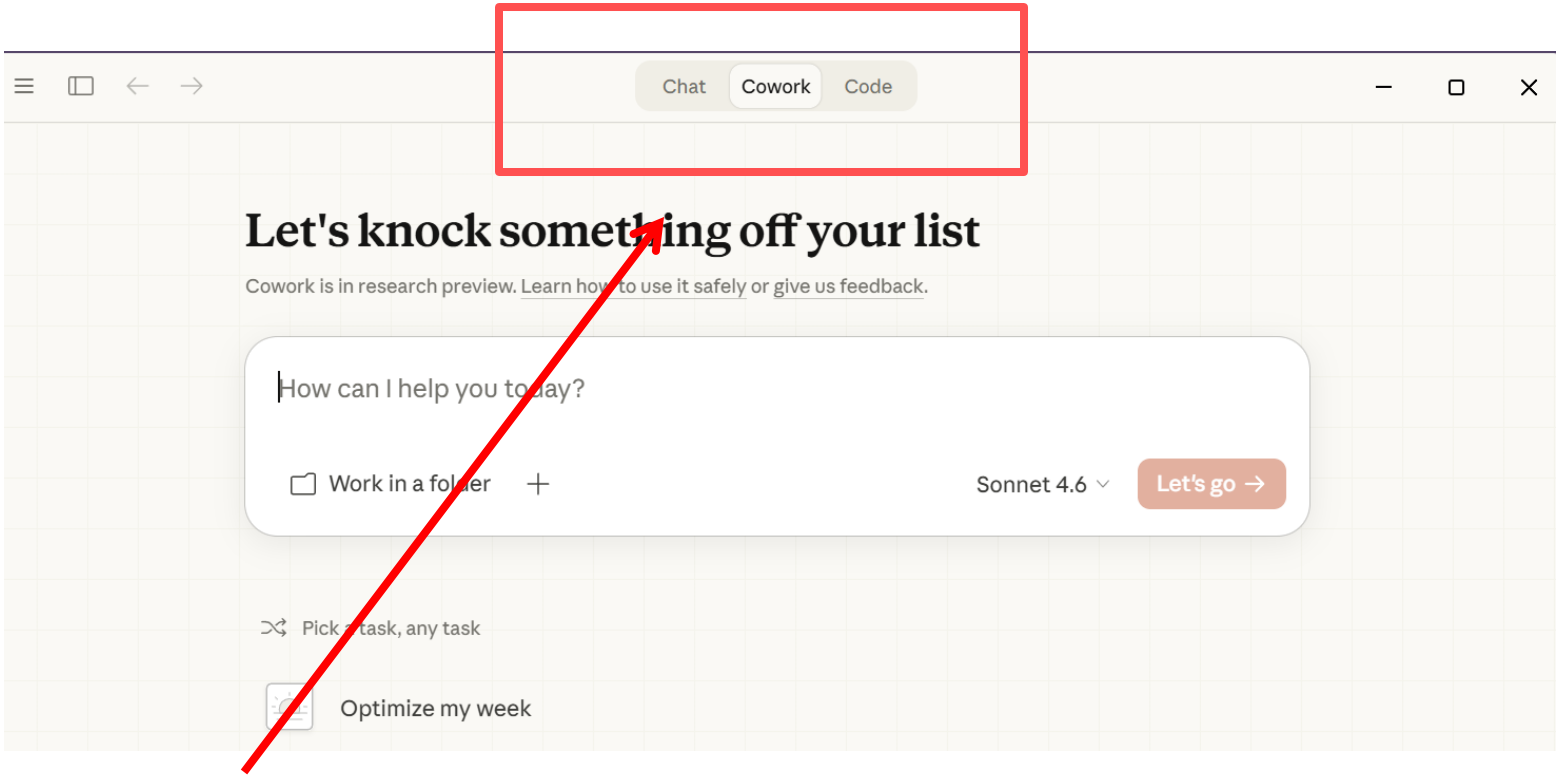
1. Better writing
Claude has a reputation for producing very high quality writing that is more human sounding. It also does a great job at tailoring the writing to your style

2. Business oriented. Has recently introduced features that are very useful for businesses. Claude Skills and Claude Cowork

3. Excellent at coding
If you are a programmer Clause is the leading AI tool to help you with coding

Expect to hear more and more about Claude in the next 12 months. It is lots of people's favourite LLM

The 3 main areas within Claude



Claude Chat = Just like Chat GPT and Gemini you can ask questions and get advice
Claude CoWork – You can ask Claude to do things for you. It becomes an AI agent
Claude Code = An area for programmers to write code and get Claude to program and do things

The difference between free and paid



Free Claude is actually quite generous and enough for many small businesses starting out.

You get:

- Access to Claude chat (web and mobile)
- Ability to write content
- Analyse documents
- Summarise PDFs and transcripts
- Basic web search
- Image analysis
- Basic projects and conversations
- Memory (recently expanded to free users)

Limitations:

- Lower daily usage limits
- Slower access at busy times
- Limited access to advanced models
- Some advanced features restricted
- You may hit message limits if using it heavily

Think of free Claude as:
Perfect for testing ideas and occasional marketing work.

The difference between free and paid



What you get with Claude Pro (€20/month)
Claude Pro mainly removes limits and adds professional productivity features. You get everything in free PLUS:

1. Much higher usage
This is the biggest difference. Typically:
- Around **5× more usage than free**
- Fewer interruptions
- Can use it daily for business work

This alone is why most serious users upgrade.

2. Priority access
Paid users:
- Get faster responses
- Less likely to be blocked at peak times
- Important if you rely on it for work.

The difference between free and paid



3. Access to more powerful models
Paid users get:
- Better reasoning models
- Extended thinking modes
- Research capabilities
- More consistent outputs

4. Projects and organisation tools
Pro gives better ways to organise work:
- Unlimited projects
- Document grouping
- Better workflow management

Very useful if using Claude like a marketing assistant.

5. Advanced productivity features
Research tools
- Integrations

These are aimed at professional users.

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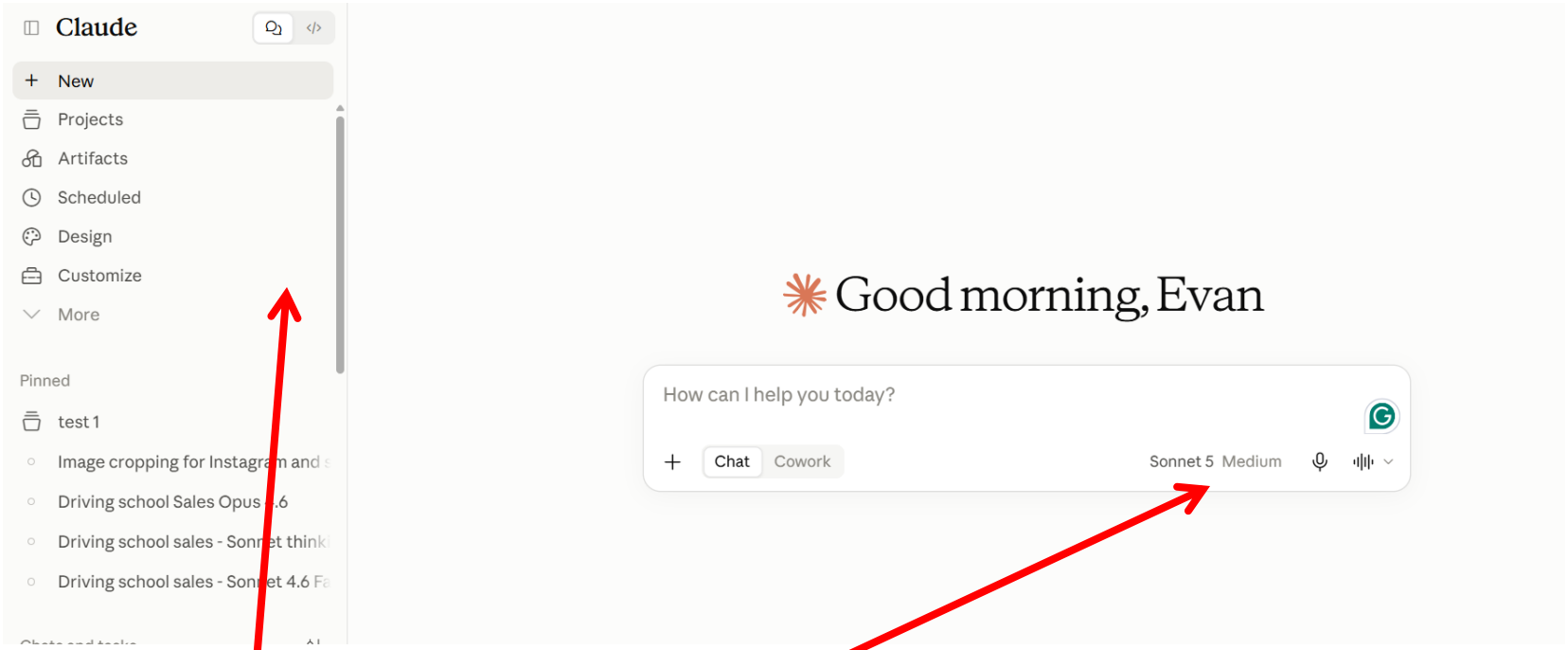
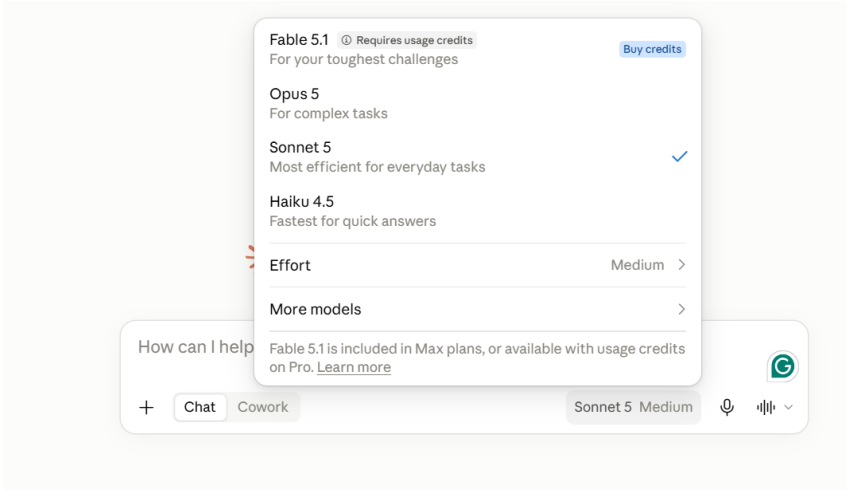
Claude Chat – it is just like Chat GPT or Gemini



When you go to Claude.ai it looks just like Chat GPT
Prompt box with choice of fast or thinking models
Chat history on the left
Settings on the bottom left

Claude Chat – why do the models have strange names and what is the difference between them?

Anthropic deliberately uses **literary/poetry-inspired names** to reflect Claude's brand around thinking, writing and analysis.



Fable is their frontier model – extremely powerful and expensive

Opus (Claude Opus 4.8)

An *opus* is a major musical or literary work (a serious masterpiece).

Best for: Strategy Complex marketing plans
Research
Analysing large documents
Difficult reasoning tasks

Sonnet (Claude Sonnet 4.6)
A *sonnet* is a structured 14-line poem known for clarity and balance.

Balanced performance between intelligence and speed.
Best for: Daily marketing work, Writing content , Improving website text
SEO tasks , Social media ideas
Simple explanation:
Use Sonnet for your everyday business tasks.

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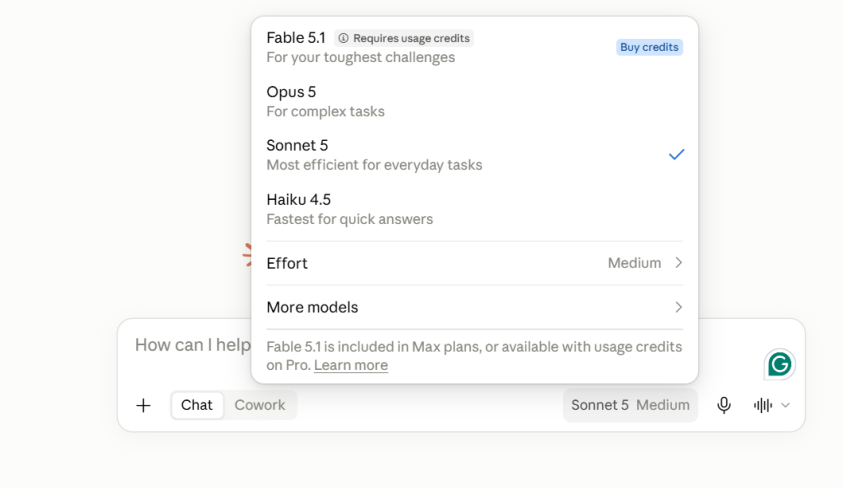

Haiku (Claude Haiku 4.5)

A *haiku* is a very short Japanese poem (fast and concise).

Speed and efficiency.

Best for:
Quick questions
Simple content
Fast summaries
Basic tasks
Simple explanation:

Use Haiku when speed matters more than depth.

When using AI Tools you need to know how to get the best answers that will help you grow your sales.



Since the launch of Chat GPT, Gemini and Claude they have consistently improved the models and their features with the result that there are now basic and advanced ways to use these tools.

It’s important to understand whether you are using the basic features or advanced ones in order to get the best results.

The MARKETING CROWD

USING AI FOR KNOWLEDGE

Getting ideas, tactics, strategies

Which Level Are You At?



1 Fast Answers

You are using the fast model and not giving much context. You ask a question, it gives a fast answer

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Which Level Are You At?



2 More Tailored Answers

Add personalisation and custom instructions. Now answers take your business details into account.

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The MARKETING CROWD

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3 Thinking / Reasoning Answers

Reasoning models. Deeper thinking, more logical, step-by-step answers

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Add personalisation and custom instructions. Now answers take your business details into account.

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You are using the fast model and not giving much context. You ask a question, it gives a fast answer

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4 Deep Research Answers

Research features. AI can scan and synthesise from larger bodies of knowledge, industry reports, or your uploaded materials

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Reasoning models. Deeper thinking, more logical, step-by-step answers

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Add personalisation and custom instructions. Now answers take your business details into account.

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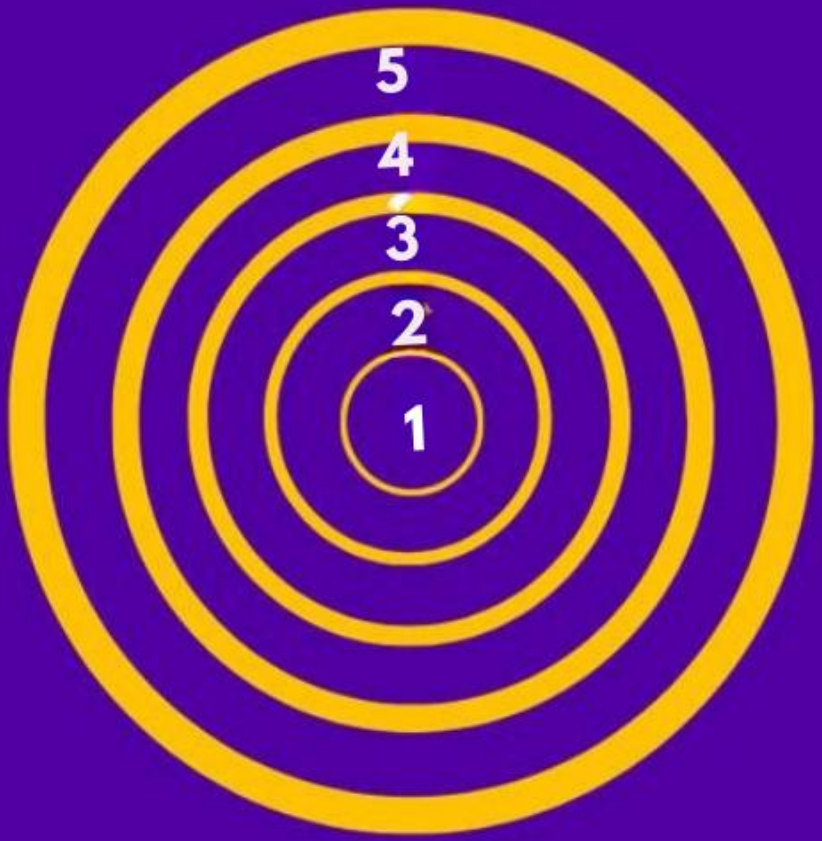
Which Level Are You At?



5 Highly Tailored Answers

Projects/Gems. Combine custom instructions + your files + research sources to make the AI highly specific to your business

4 Deep Research Answers

Research features. AI can scan and synthesise from larger bodies of knowledge, industry reports, or your uploaded materials

3 Thinking / Reasoning Answers

Reasoning models. Deeper thinking, more logical, step-by-step answers

2 More Tailored Answers

Add personalisation and custom instructions. Now answers take your business details into account.

1 Fast Answers

You are using the fast model and not giving much context. You ask a question, it gives a fast answer

Most businesses are only using the basics



Most businesses are using AI at the first or second stage (Fast answers with custom instructions)

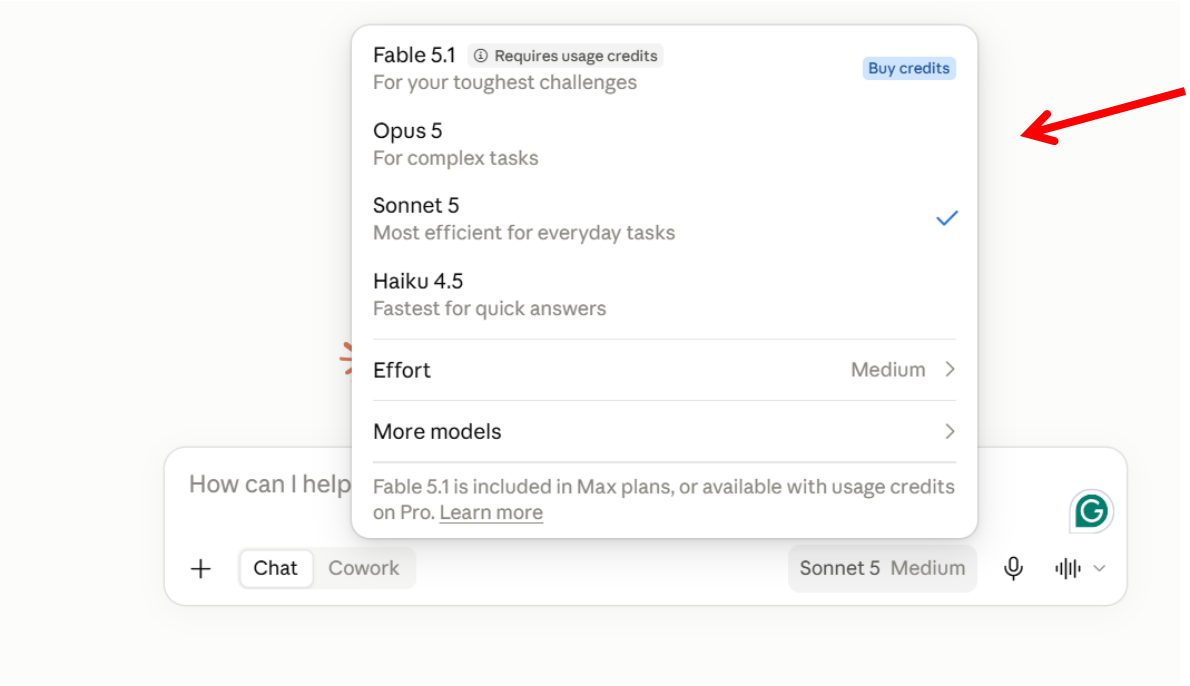
It is when you progress and use

- Reasoning / thinking models
- Deep research
- Projects or Gems

Then it becomes far more powerful for your digital marketing

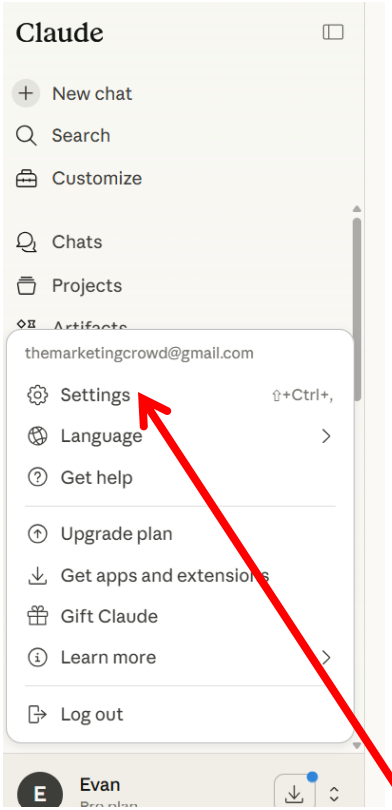
Claude allows you to operate at level 5

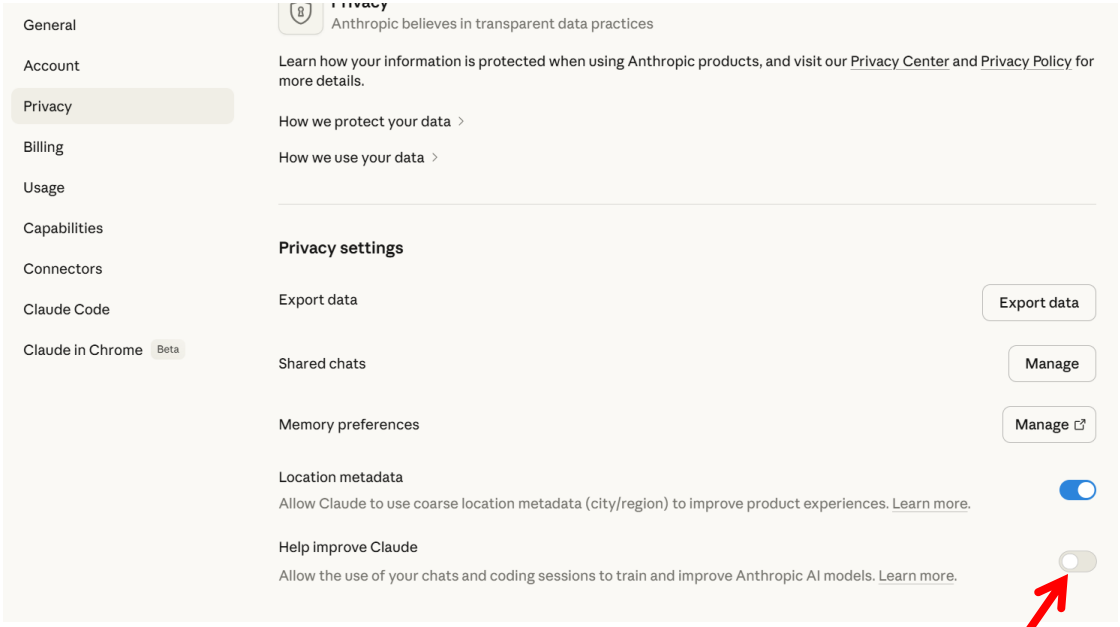
Claude for Level 1 – Quick Answers



By default, you are getting a fast answer

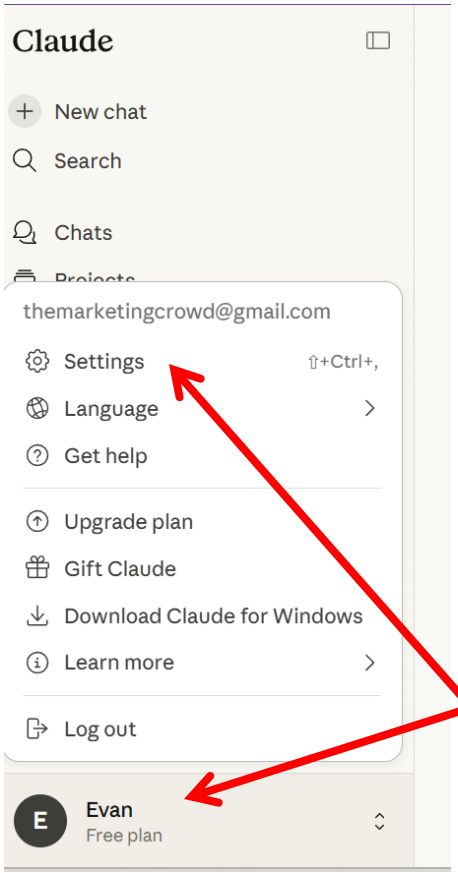
Claude for Level 1 – how to protect your privacy

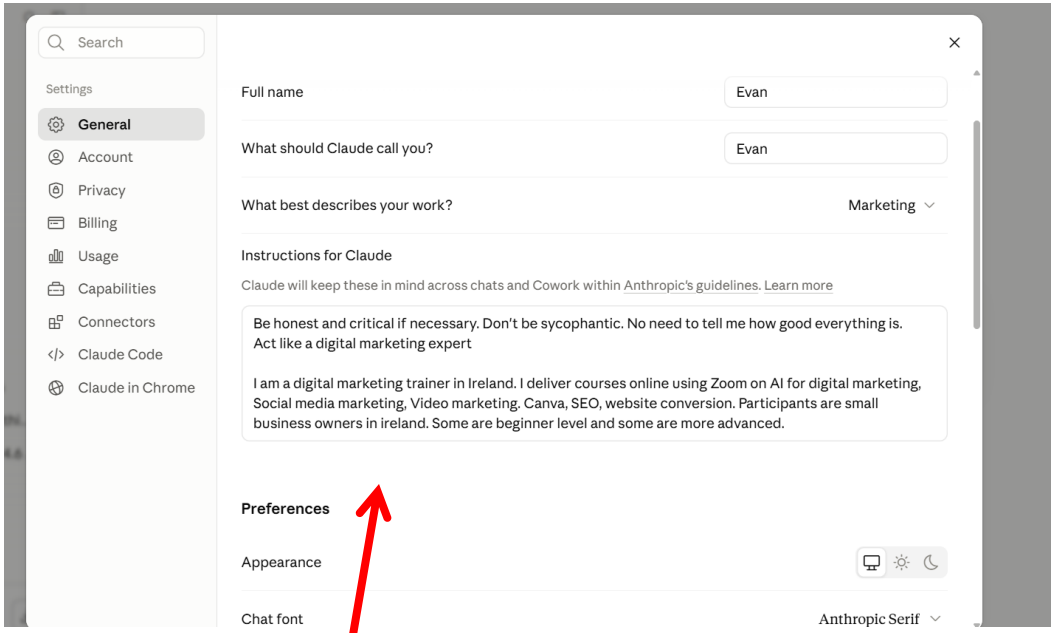




To get to settings click on your name in the bottom left
Then click Settings
Then click Privacy
Where it says “help improve Claude” switch that off

Claude for Level 2 – Tailored Answers (personalisation)

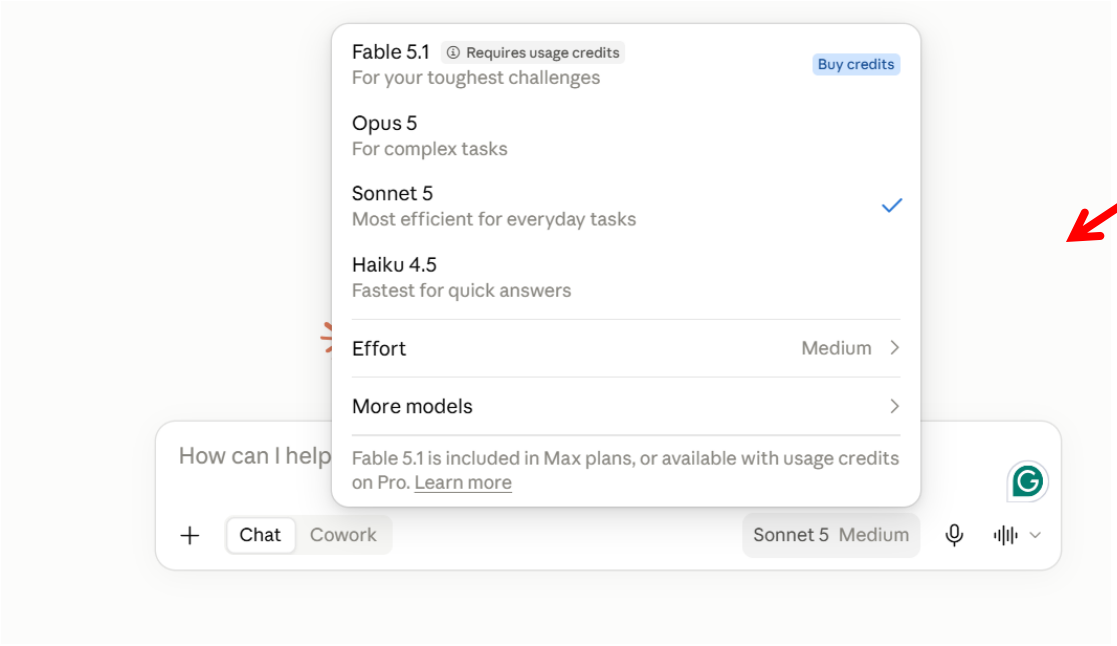




You can provide lots of context and custom instructions in the customise section

Click on your name bottom left
Then settings
Then General
Then in the personal preferences section provide the custom instructions and about you info you provided Chat GPT

Claude for Level 3 – Thinking Model

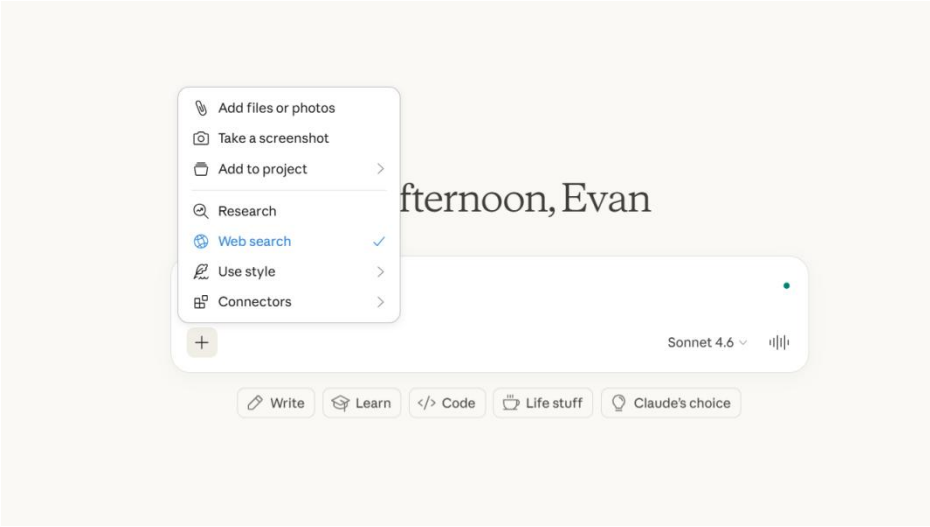


By default, you are getting a fast answer

To get a thinking answer you click the model (e.g. Sonnet) and then switch on Thinking

If you want it to produce a more though answer switch the effort to High and also turn on thinking

Claude for Level 4 – Deep research



Claude has a deep research option. However ..

1. It is not available in the free version
2. It does very comprehensive research – sometimes hundreds of sources
3. The final research report is typically shorter and more concise than Chat GPT / Gemini. Usually around 6 pages.

Claude for Level 5 – Highly Tailored Answers (Projects)



You can create a project using the free version

Click on Projects in the left menu

Then click Create Project

Then attach your deep research reports as context and also write custom instructions.

Then ask all your questions / chat to do with that topic within the Project

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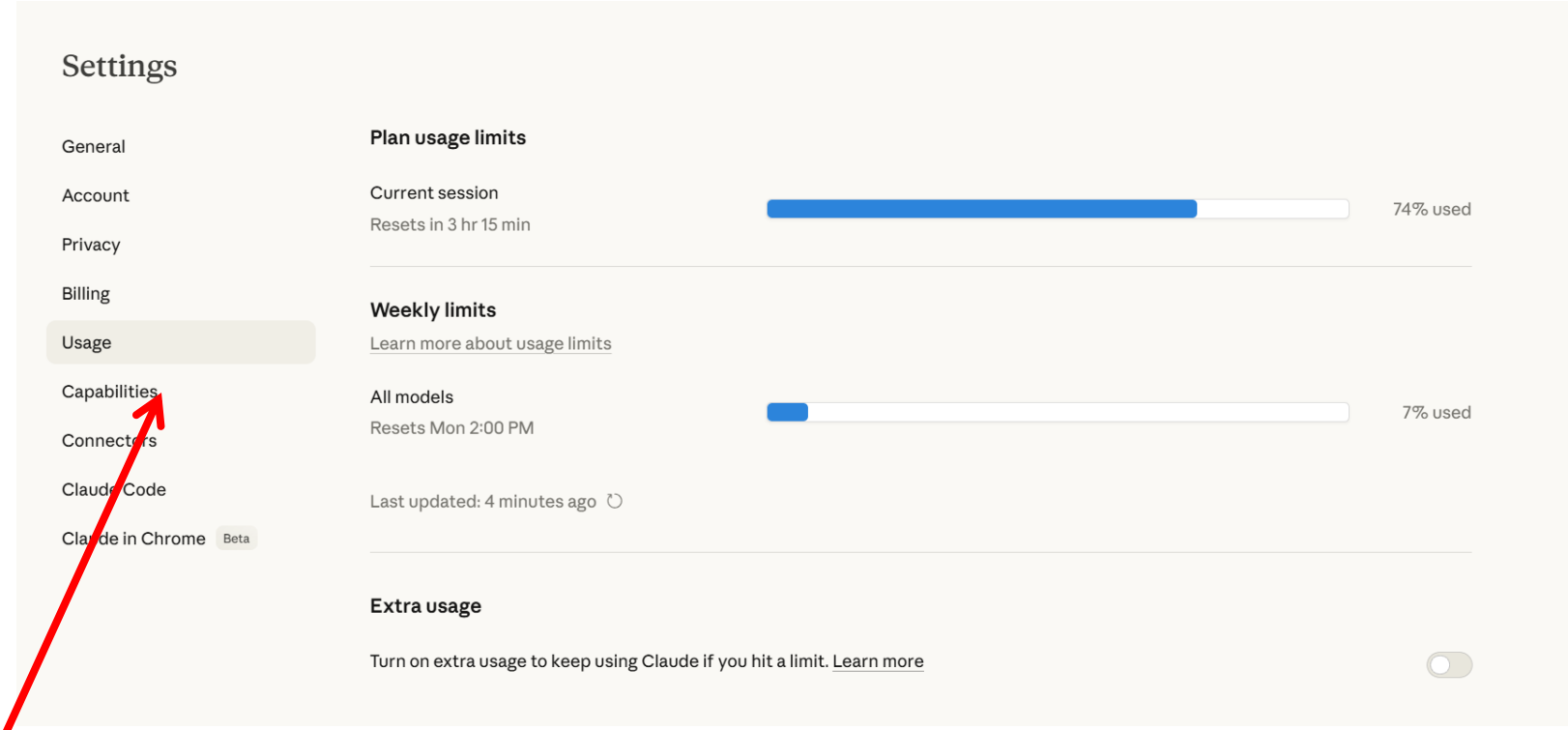
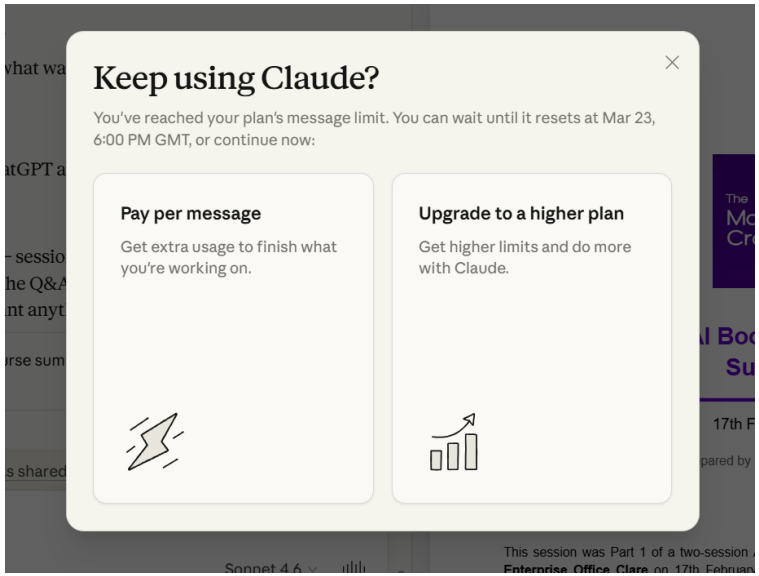
Usage Limits



Claude operates a usage limit system.

Your usage is not visible on the free plan.
If you are on the paid plan go to Settings / Usage to see how much of your 5 hour and weekly usage limit you have left

Usage limits



The usage limits are not 100% clearly explained. They do not say that you get to have 20 message or you can upload 5 files.

Instead it is to do with how much computing you use. Some tasks and models use more computing and will burn through your usage faster.

Low usage = Normal chat, sonnet model

High usage = Opus model;, attaching a 50 page file for analysis, continuing a chat that is very long so it has to review the entire chat when answering

You get a 5 hour allowance and a weekly allowance

- Big tasks use more
- Small tasks use less
- New chats help conserve usage

Usage limits



As a rough guide ...

Free Claude roughly equals:
30–60 minutes of serious work per day
if used efficiently.

Pro equals:
Several hours of work per day

Usage limits – 5 hour usage window



Claude uses a **rolling 5-hour usage window**. Once you send your first message after a reset, the clock starts and all activity during that period comes out of one allowance.

The simple way to think about it
Think of it like a spending limit rather than a message limit.
Send your first message at **10:00** → your window runs until about **15:00**
Everything you do in that time uses part of your allowance
When the allowance is gone, you must wait for the next window

How the system works
1. The timer starts with your first message
Your 5-hour window begins when you send your first prompt after a reset.
2. You have a usage allowance
During that window you have a fixed usage budget. This depends on:

- Your subscription plan
- Which model you use (for example Sonnet or Opus)
- What you are doing (normal chat vs coding tasks)
- How large or complex your prompts are

Usage limits – 5 hour usage window



3. You can hit the limit before 5 hours
If you use up your allowance early:
Claude will stop accepting new prompts
You will see a message saying your limit is reached
You must wait until the window resets

4. The next message starts a new window
Once the 5 hours pass:
Your allowance resets
Your next message starts a fresh 5-hour period

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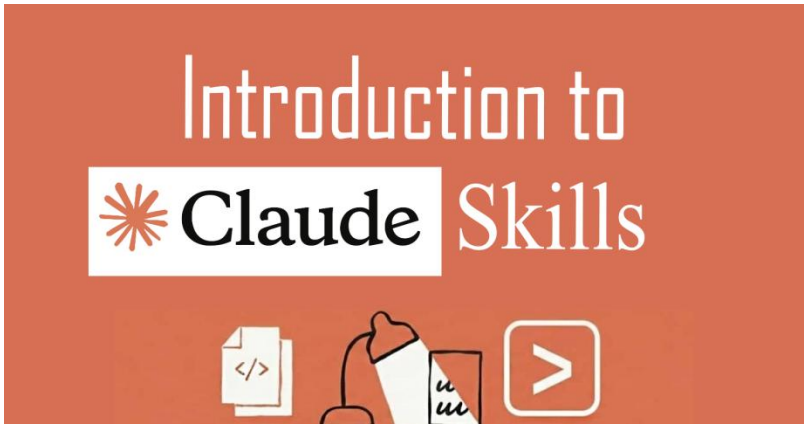
Skills



What a Claude Skill Is

Think about training new staff members
The first few times you explain to each new staff member how you want things done:

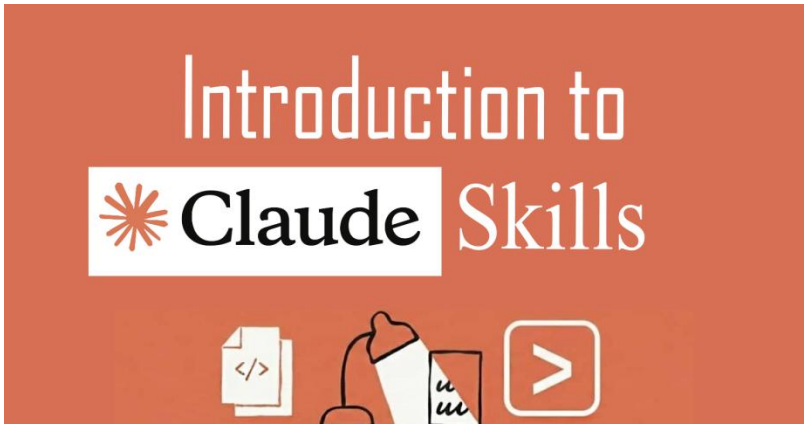
- How to write emails
- How to structure reports
- How to plan content

After a while you realise you're repeating yourself.

A better approach is to write your process once so it can be followed every time.
That is basically what a Claude Skill is.
It is:

A set of instructions you create once that Claude can reuse whenever needed.

Skills



The key difference between a prompt and a Skill

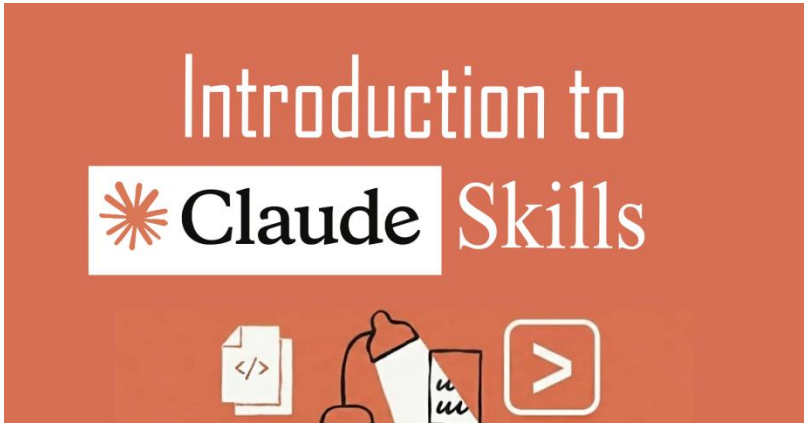
A normal prompt:
You write instructions → Claude answers → conversation ends → instructions gone.

A Skill:
You write instructions once → saved in your account → reusable anytime.

Prompt = one conversation
Skill = reusable system

Very important to understand:
A skill can be used in a normal chat, in any project or in the AI agent (Claude CoWork)

Skills



Practical ways Skills help

1. Save your workflows

If you do something regularly:

- Turn Zoom transcripts into meeting summaries or reports
- Write monthly reports based on spreadsheets or word docs
- Write Email newsletters

You can build the process once and turn it into a skill in order to keep re-using reusing it

This saves time and improves consistency.

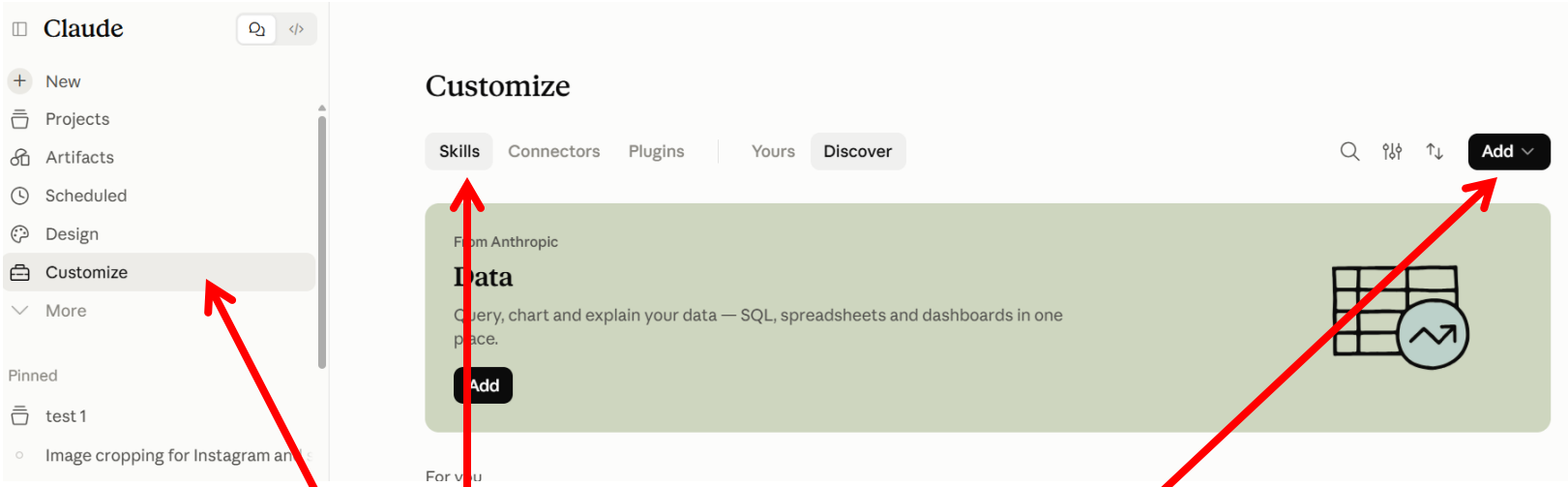
2. Make Claude sound like your business & always understand your business

You can create skills for

- Your writing style
- Your brand colours and typefaces
- Context about your products & customers

This is what turns Claude from a generic tool into something that feels like part of your team

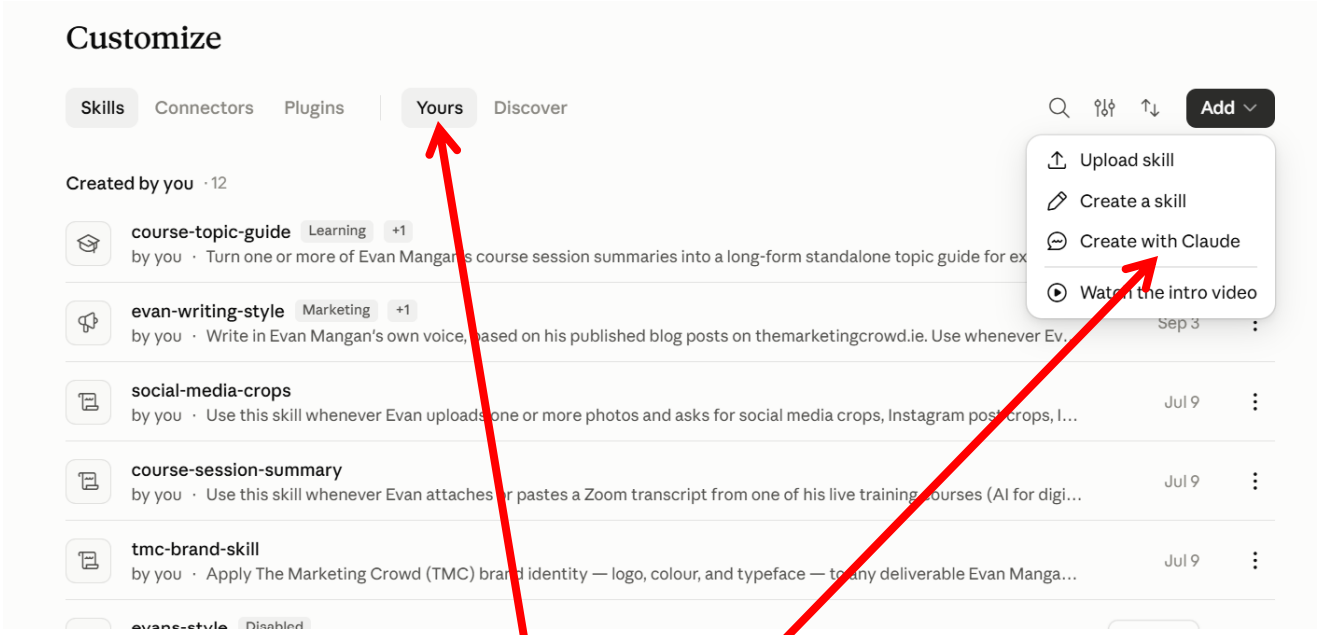
How to create a skill that creates documents using my brand colours & fonts.



On the left hand menu click customise

Then either click Skills here or click Create new skills here

How to create a skill that creates documents using my brand colours & fonts.

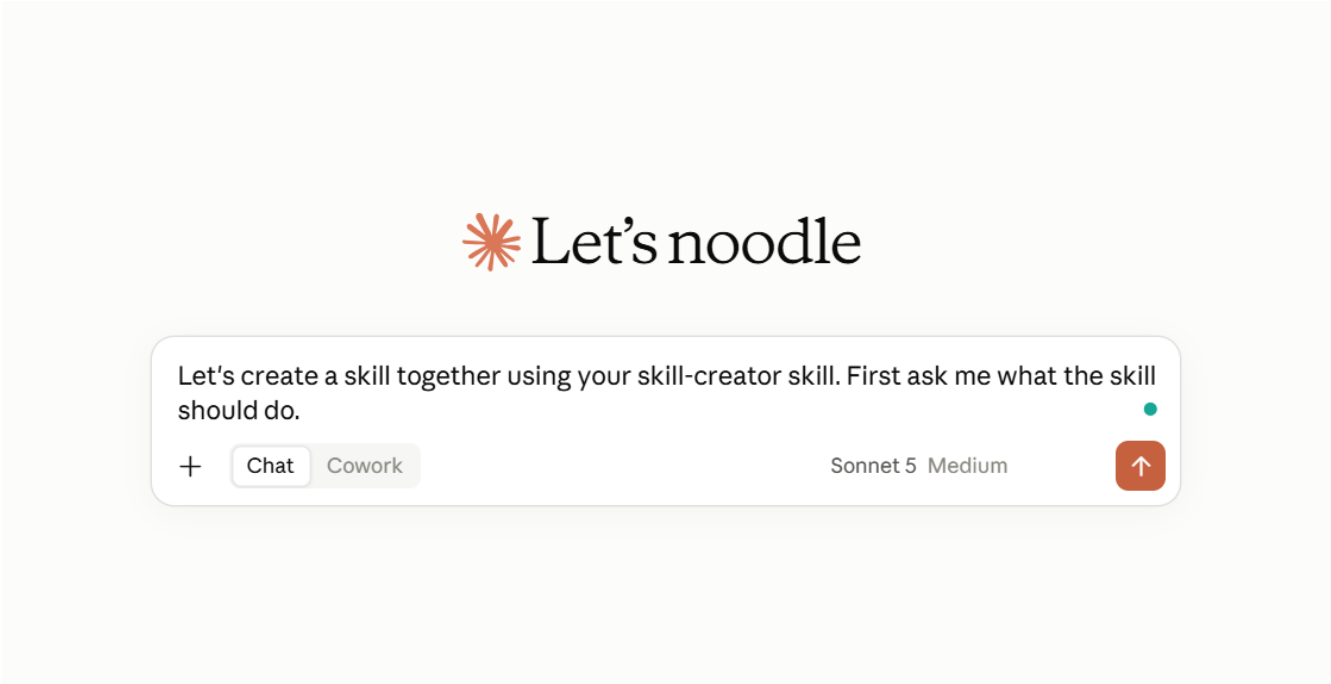


If you have created skills you will see them here

To create a new one click on the + icon

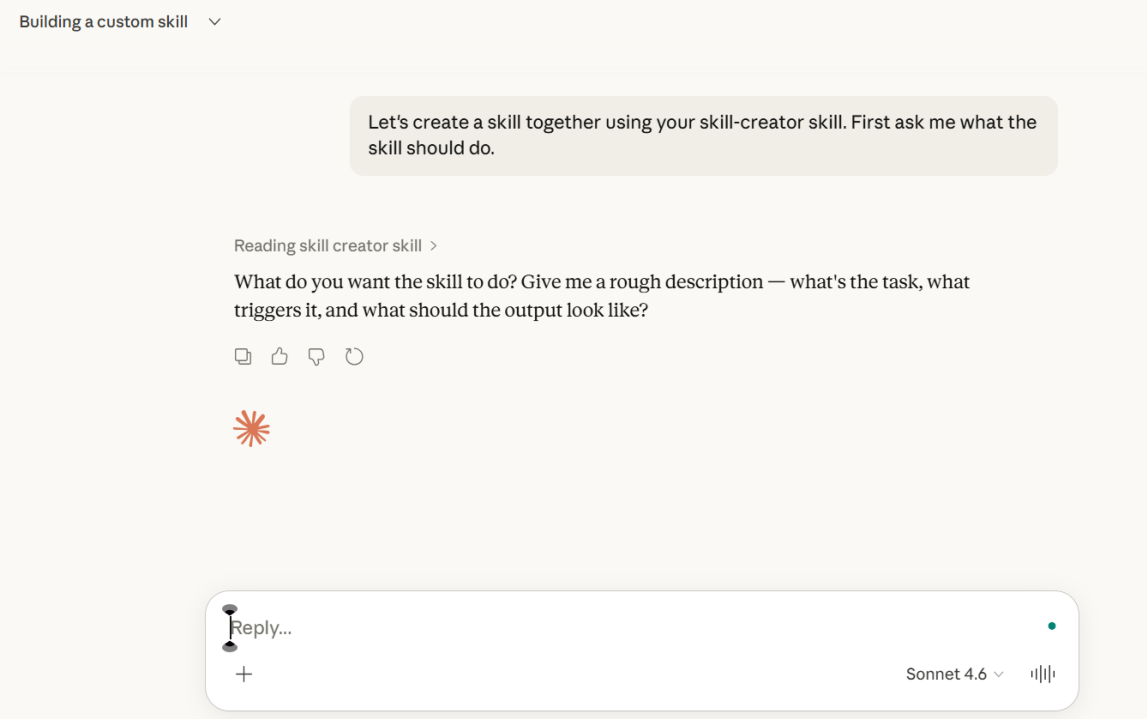
Then select Create with Claude

How to create a skill that creates documents using my brand colours & fonts.



It will then generate a prompt.
Hit submit

How to create a skill that creates documents using my brand colours & fonts.

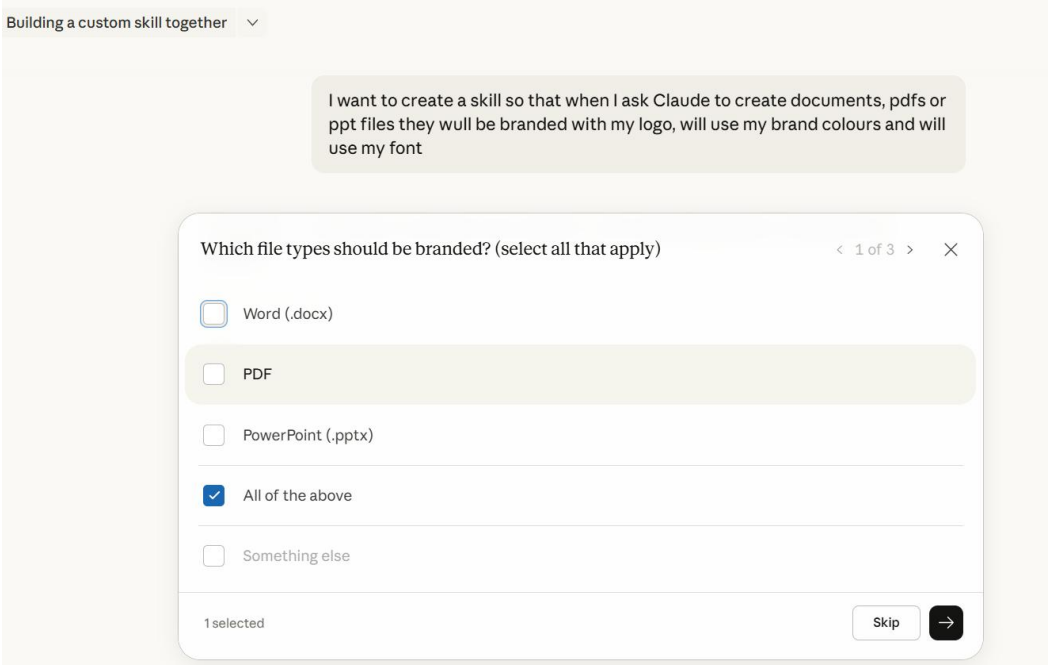


It will then ask you a question

In the prompt box describe what you want the skill to be. For example, use this prompt...

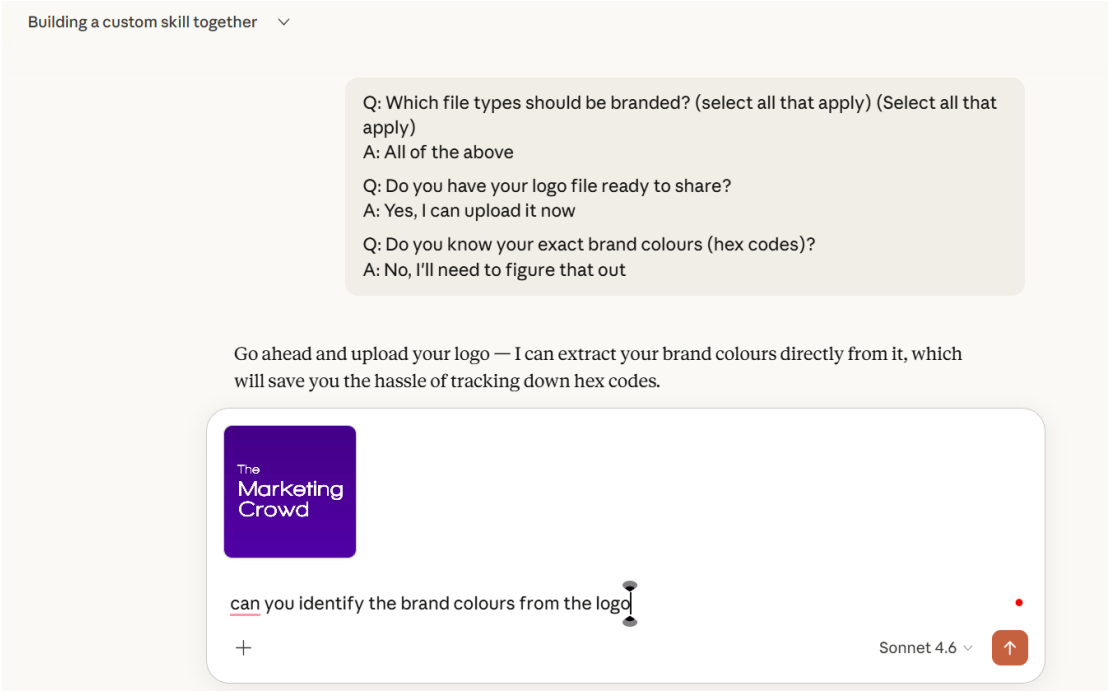
I want to create a skill so that when I ask Claude to create documents, pdfs or ppt files they will be branded with my logo, will use my brand colours and will use my font

How to create a skill that creates documents using my brand colours & fonts.



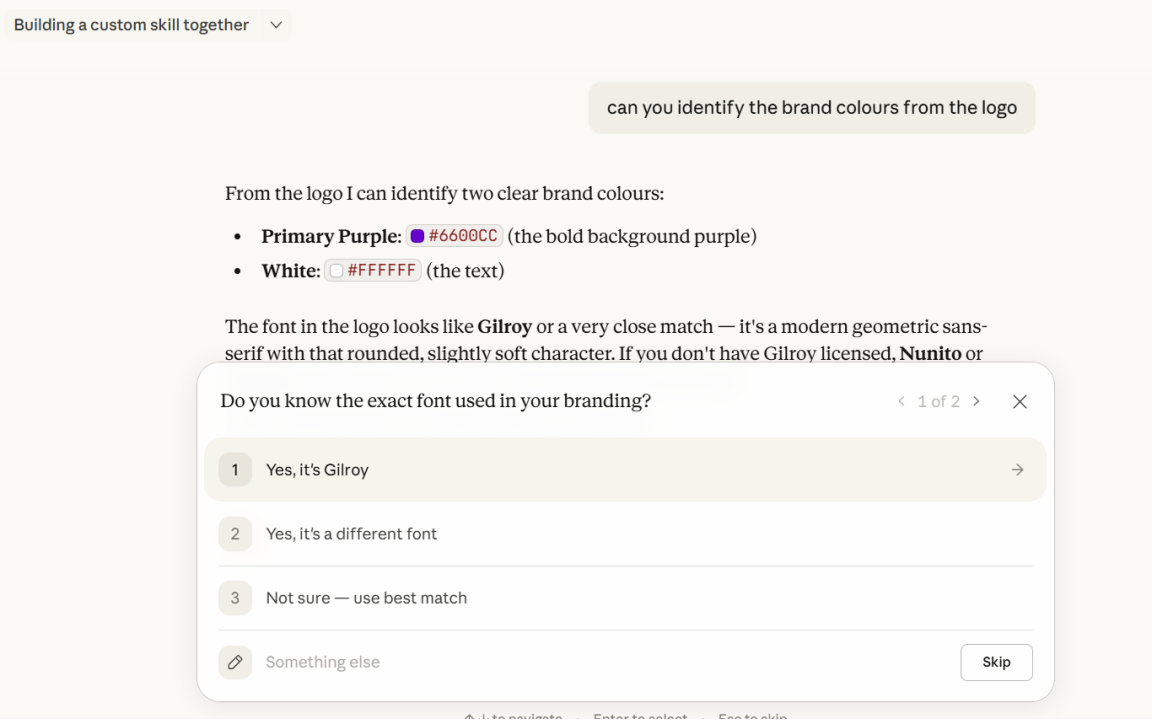
It will then ask you a few questions and will want you to upload your logo and provide your brand colours and typeface / font

How to create a skill that creates documents using my brand colours & fonts.



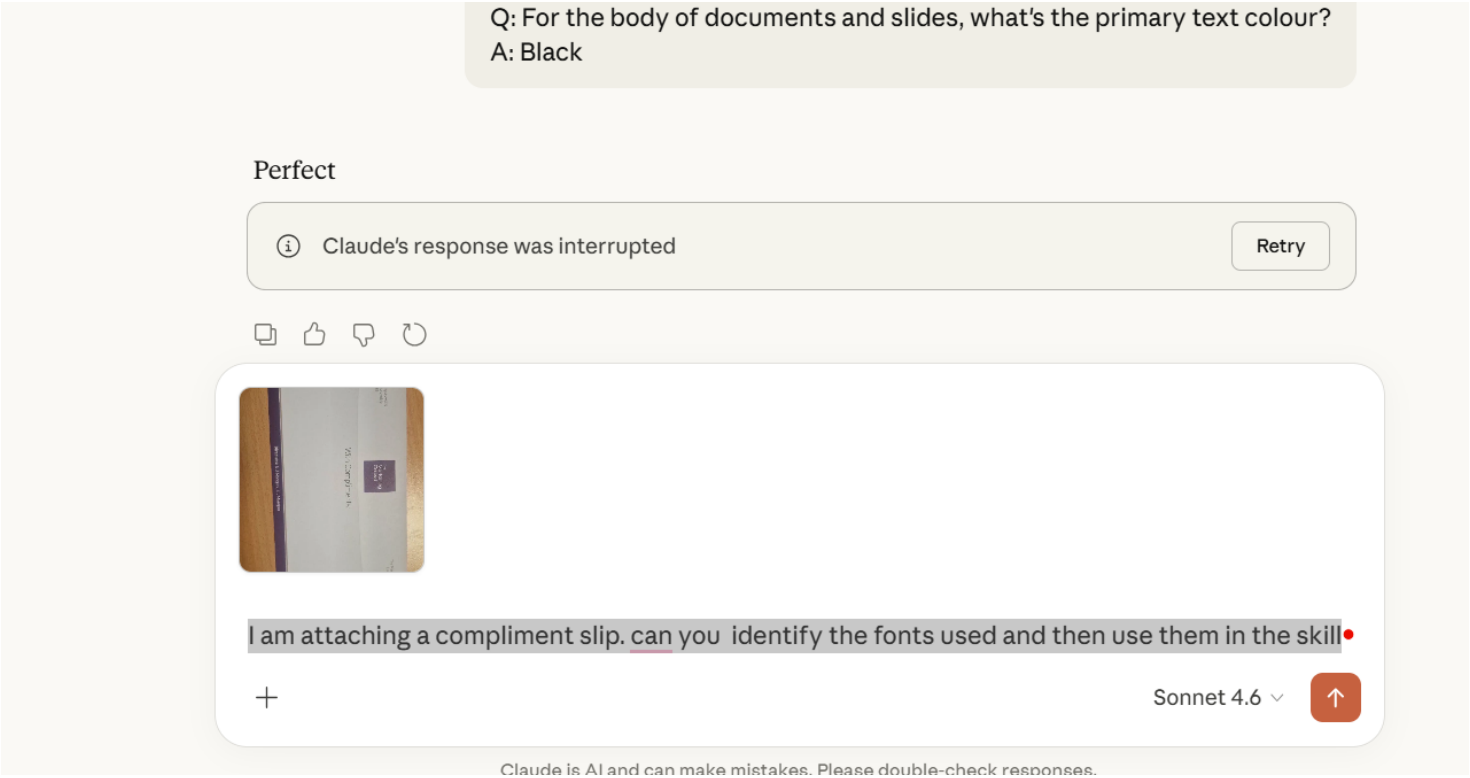
When I uploaded my logo I asked Claude to identify the colour codes based on the logo

How to create a skill that creates documents using my brand colours & fonts.



It also identified the font in the logo.

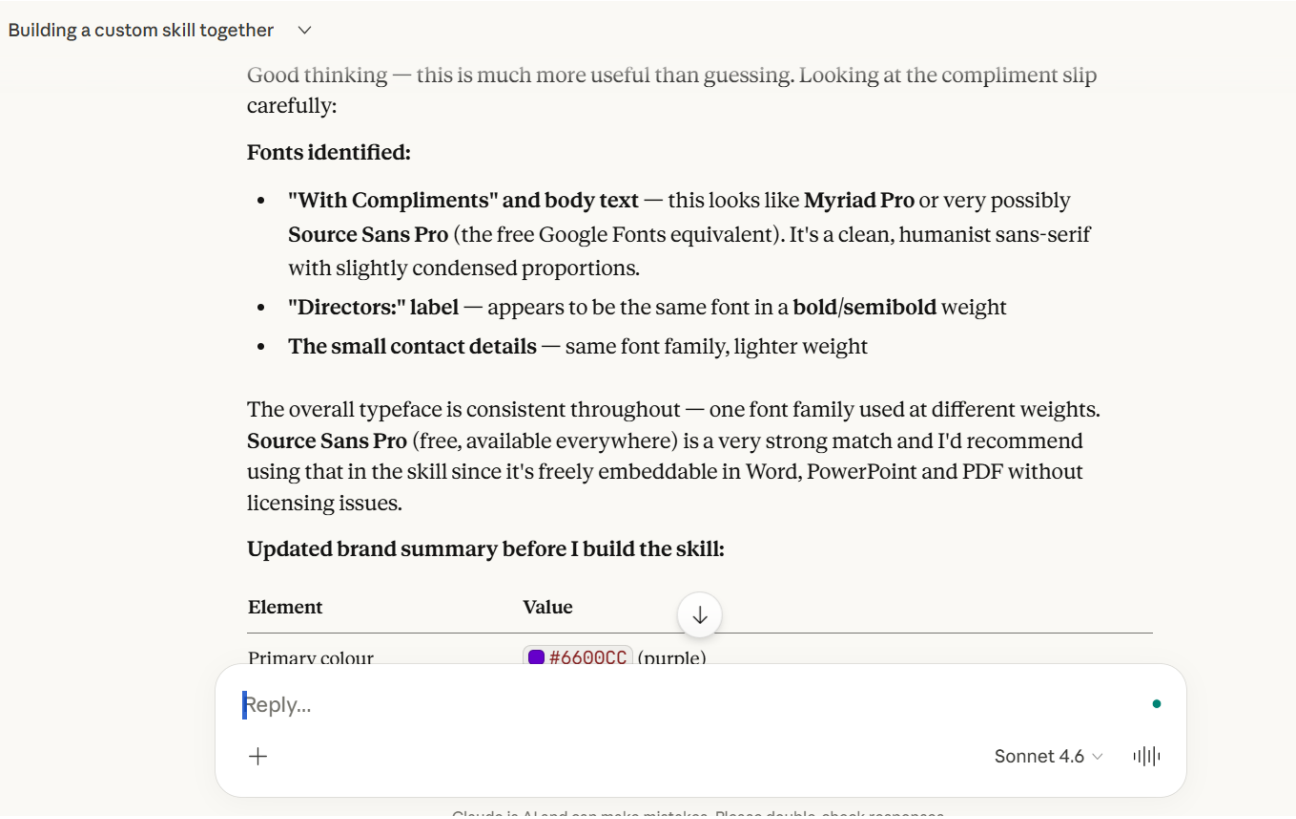
How to create a skill that creates documents using my brand colours & fonts.



I also attached a compliment slip and said I am attaching a compliment slip. Can you identify the fonts used and then use them in the skill

.

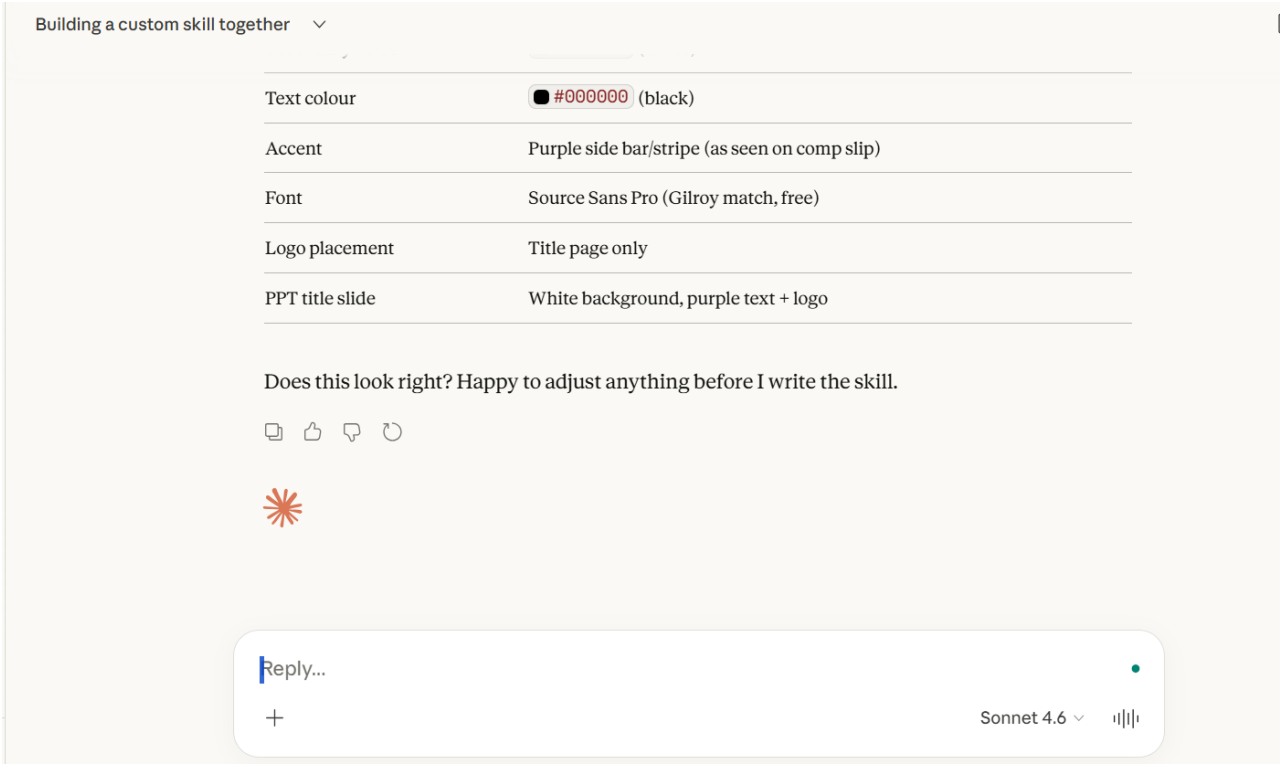
How to create a skill that creates documents using my brand colours & fonts.



It then identified the fonts

.

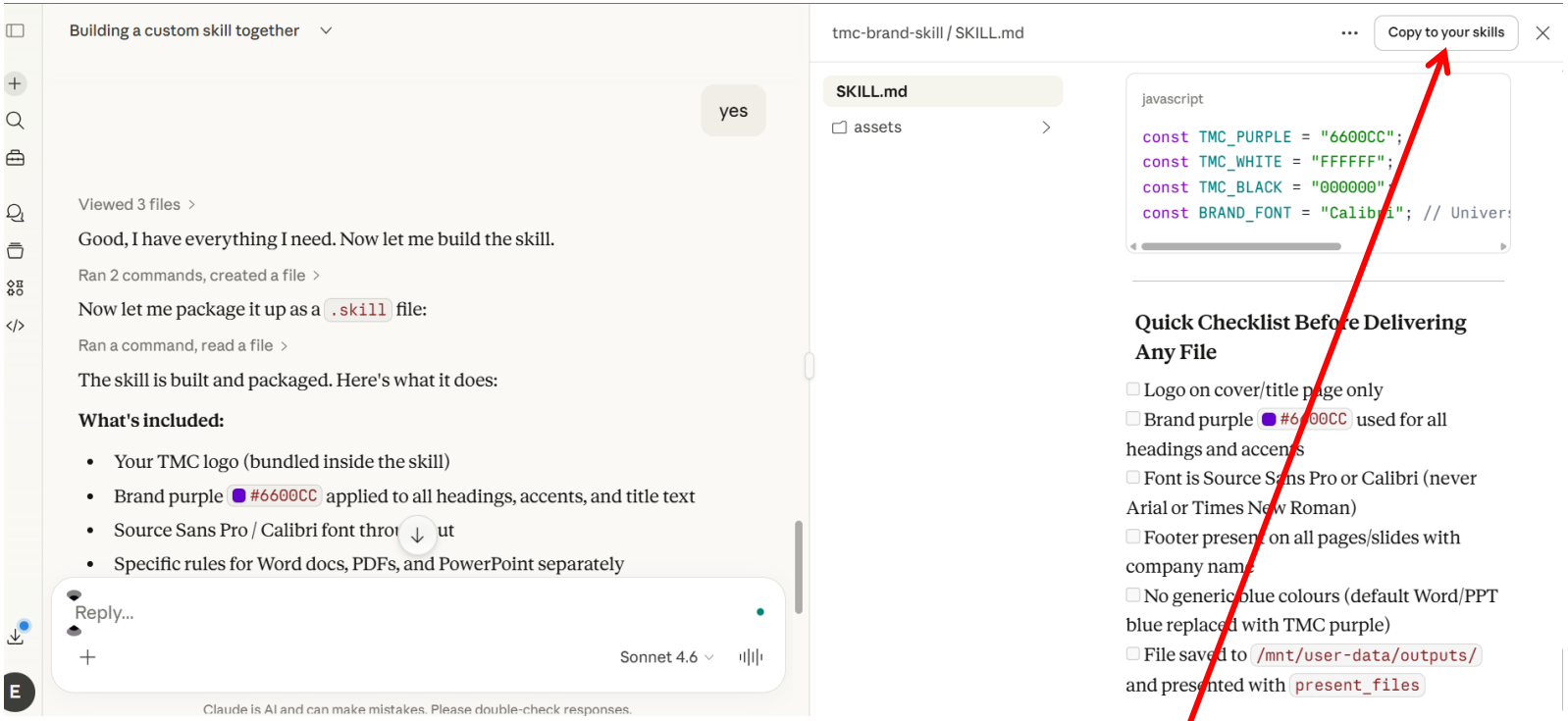
How to create a skill that creates documents using my brand colours & fonts.



It then summarised everything it was putting in the skill and asked me to approve. I said yes

.

How to create a skill that creates documents using my brand colours & fonts.

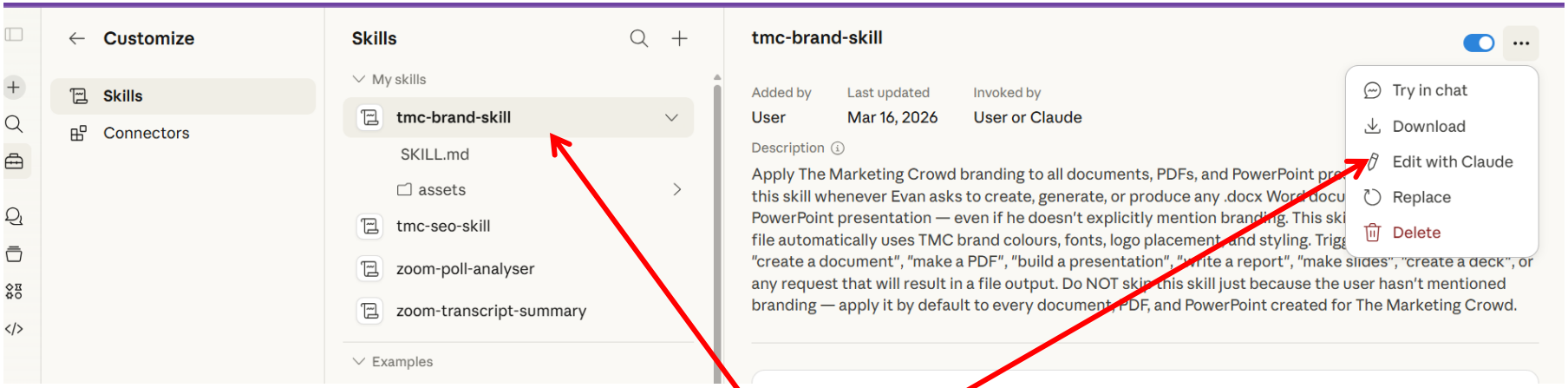


It took a few minutes for it to build the skill

Note: You then need to save this skill to your skills. Click on “Copy to your skills”

.

How to create a skill that creates documents using my brand colours & fonts.



If you now go back to your skills (Customise / skills / my skills"

You will see it listed

Click on it
The click the 3 dots top right and you can delete it, download it (to share with someone) or edit it with updated rules if you wish

.

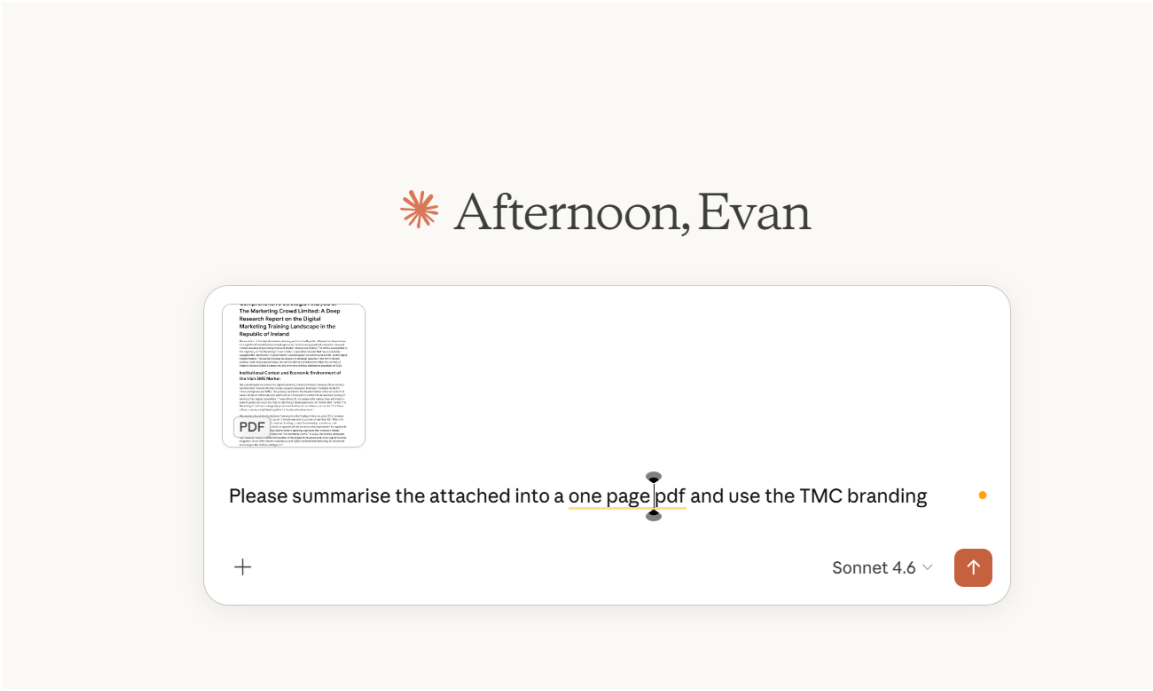
What this skill allows me to do ...

FROM NOW ON...

From now on, whenever I ask Claude to do something whether in a chat, a project or Claude CoWork ...

If I say and use the TMC brand style it will use this skill and add our logo, font and colours to the final document

What this skill allows me to do ...

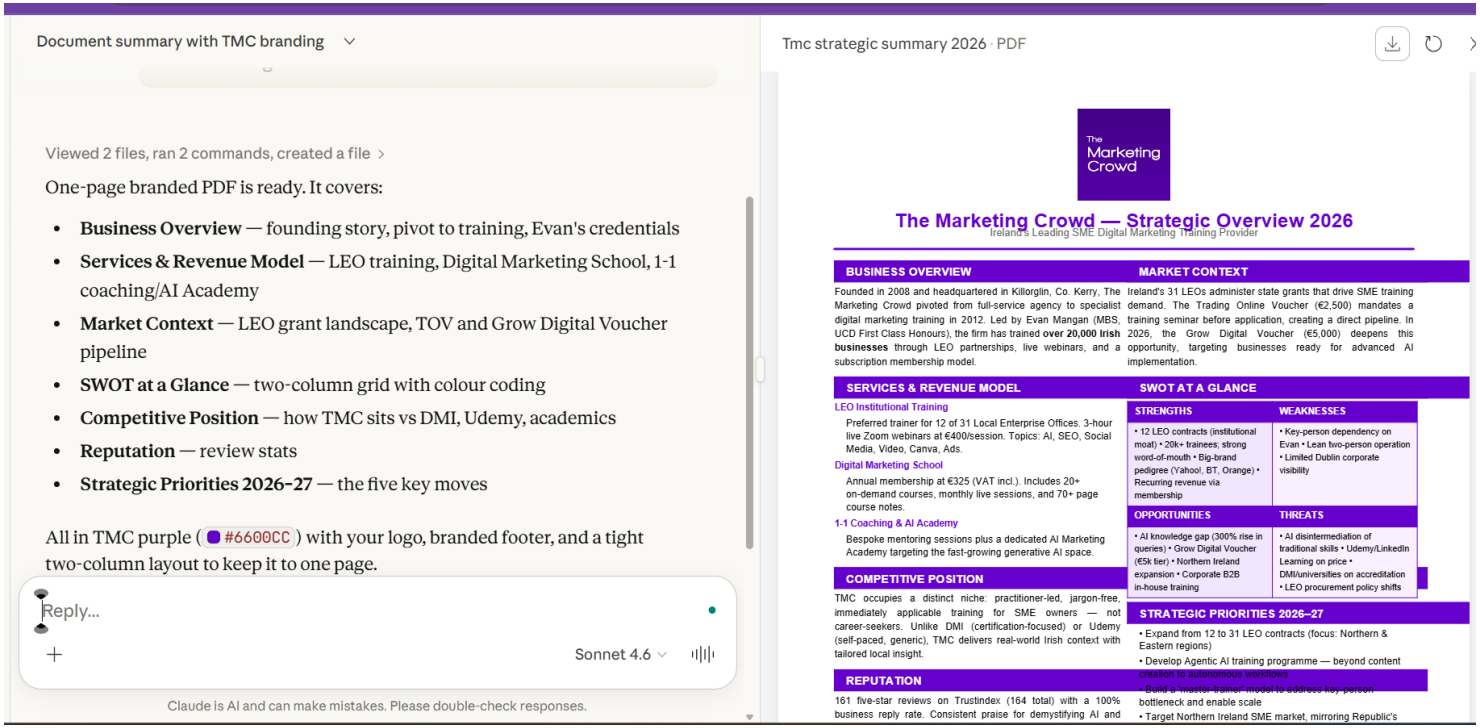


For example

I attached a deep research report and asked ...

Please summarise the attached into a one page pdf and use the TMC branding

What this skill allows me to do ...



It then created the branded pdf

Other skills I created – Writing style and "About my Business"



Think about the types of skills Claude would benefit from using consistently when you ask it to do things

1. To be able to write "Like me" or "In our brand voice"

So I created a skill where I said "I want to create a skill so that when I ask you to write something you will use this writing style" and I then attached examples of my writing. It then asked me questions and created the skill

2. To always understand our products and services

I created a skill and said that whenever I ask you for business advice I want you to understand in detail the products and services that I sell. I attached a deep research report on my business

Other skills I created – admin tasks



Also think about the “admin” type things you do regularly that take up a lot of time.

For me these are

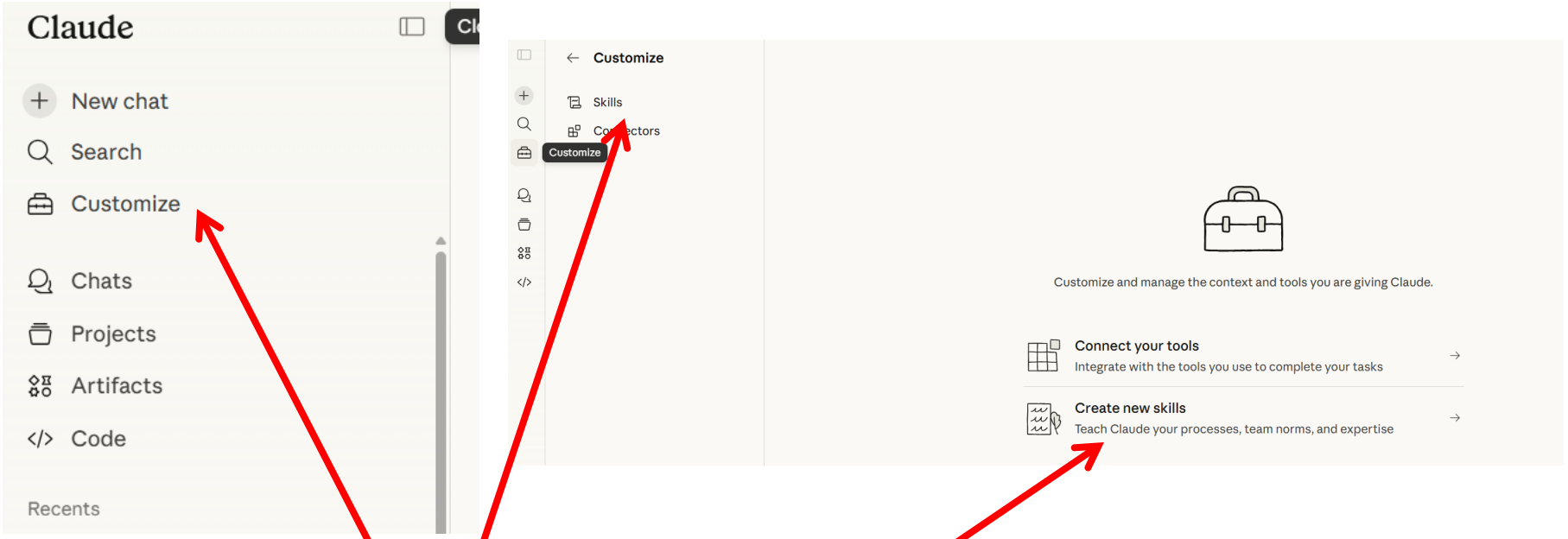
1. **Turning a transcript from a training course into a summary document.**

I created a skill where I asked for

a) When I attach a course transcript summarise the main points, ensure you do x and don't do y in the summary
b) And also use the TMC branding skill to create the file with our branding

2. Taking attendance sheets provided by LEOs and converting them into a template that we use.

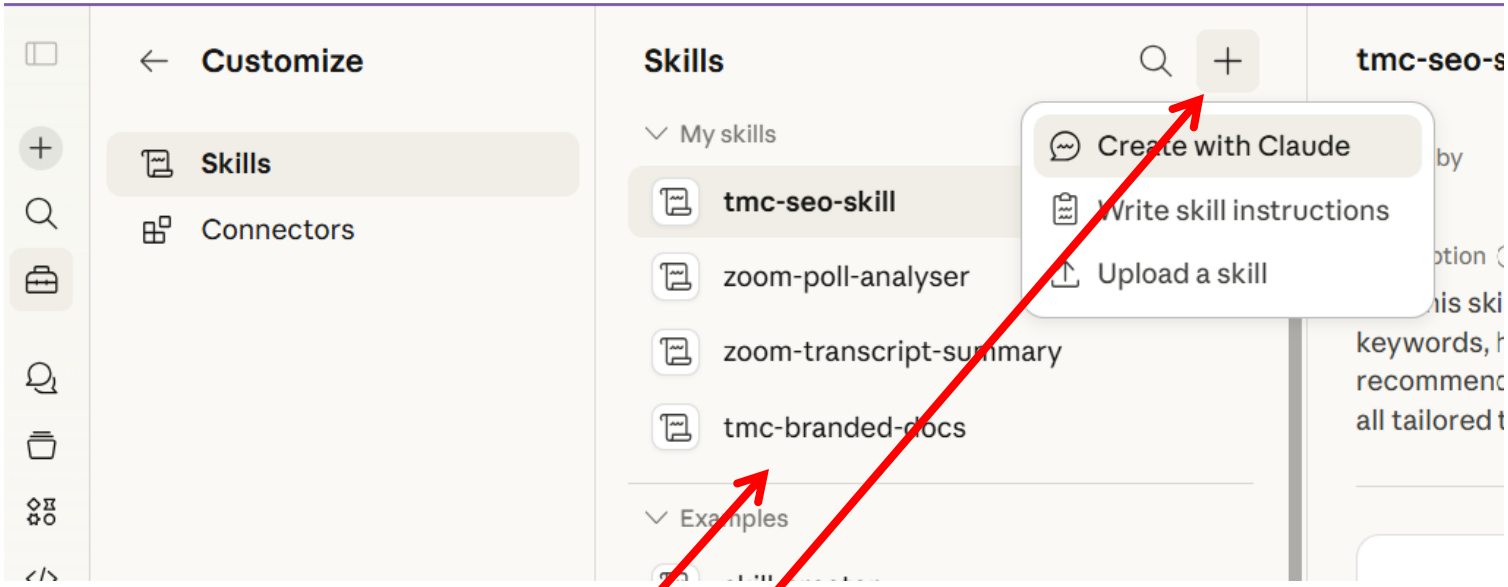
A skill to “Summarise a Zoom transcript into a branded report”



On the left hand menu click customise

Then either click Skills here or click Create new skills here

A skill to “Summarise a Zoom transcript into a branded report”

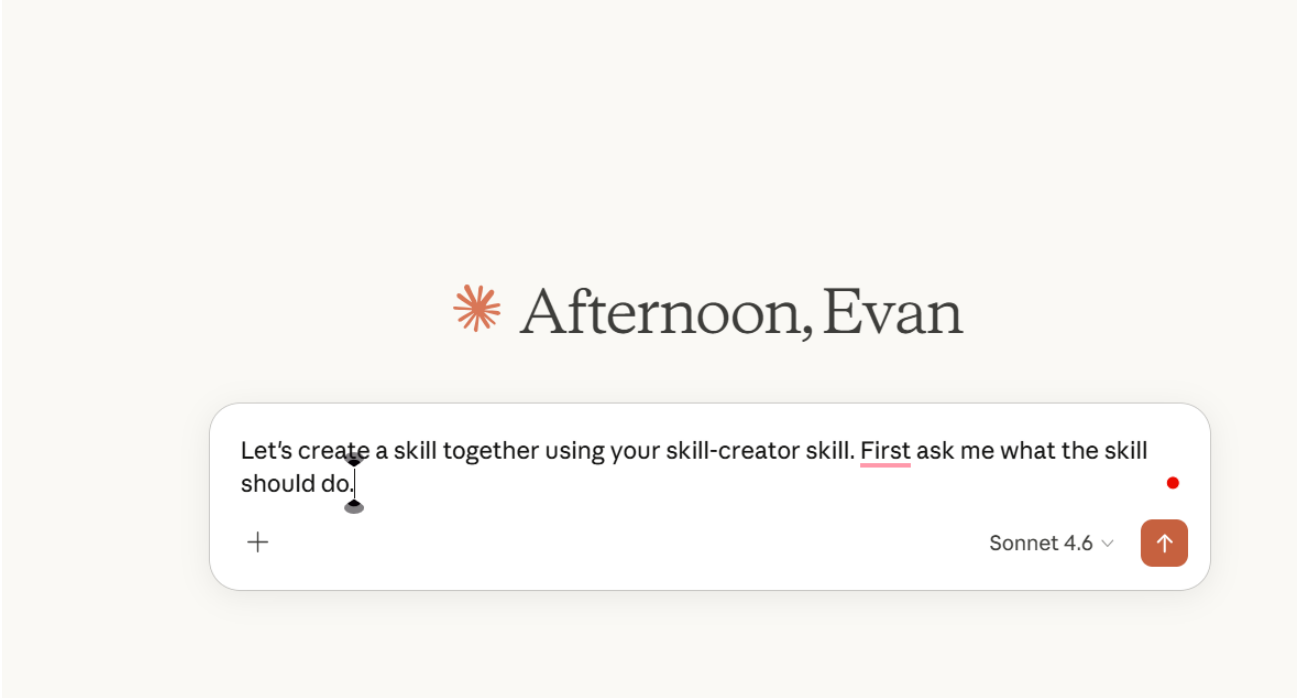


If you have created skills you will see them here

To create a new one click on the + icon

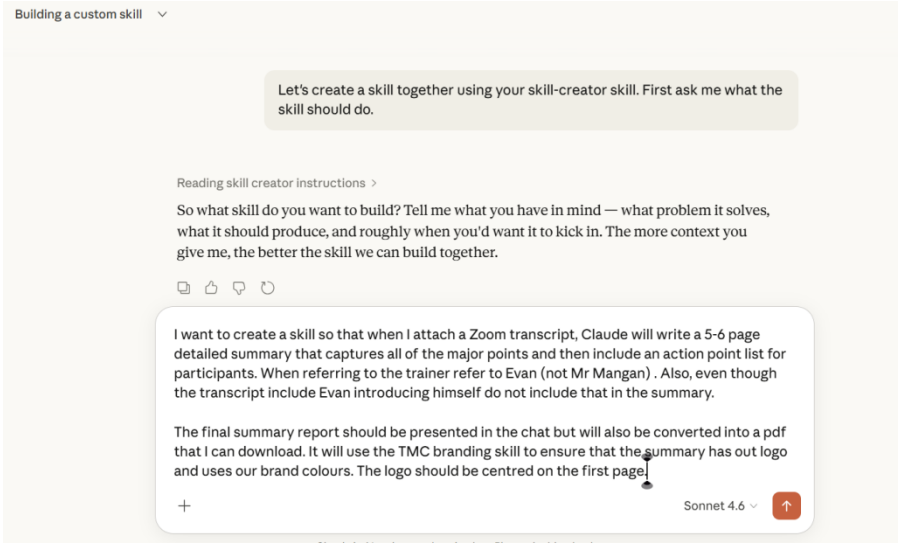
Then select Create with Claude

A skill to “Summarise a Zoom transcript into a branded report”



It will then generate a prompt.
Hit submit

A skill to “Summarise a Zoom transcript into a branded report”

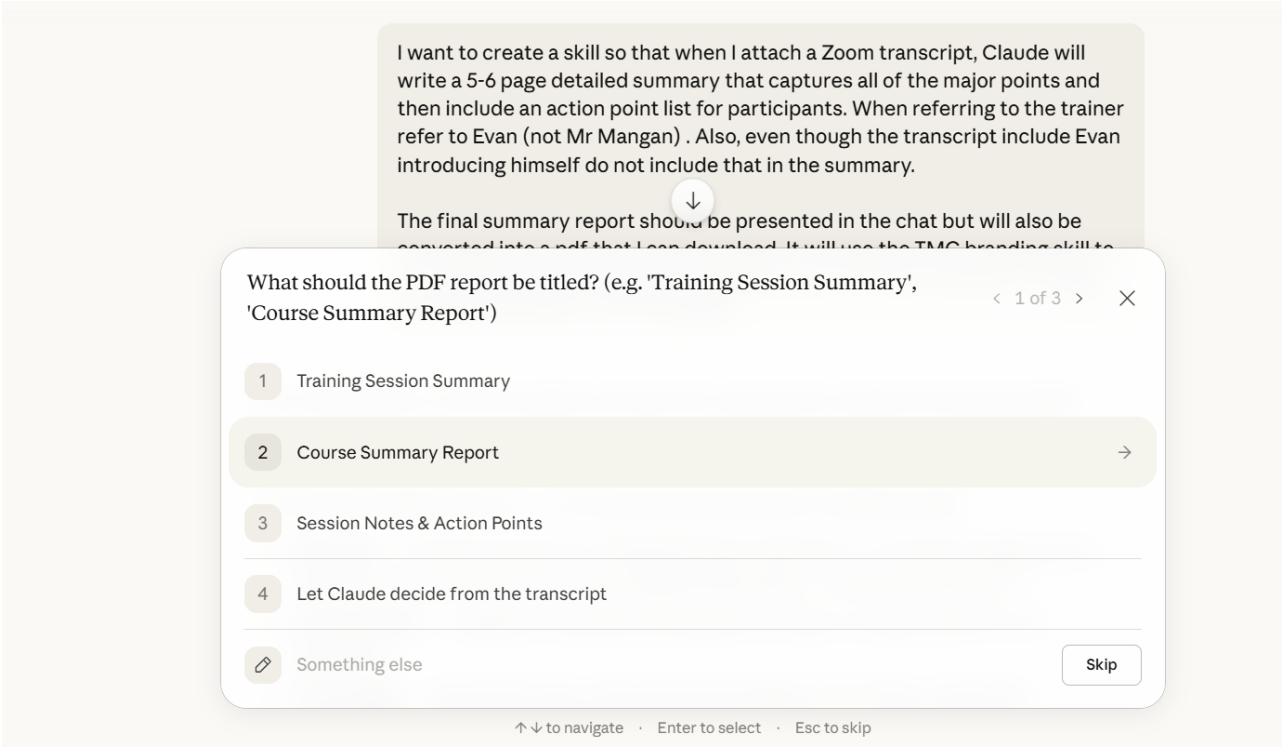


It will then ask you a question. In the prompt box describe what you want the skill to be. For example, I wrote this prompt..

I want to create a skill so that when I attach a Zoom transcript, Claude will write a 5-6 page detailed summary that captures all of the major points and then include an action point list for participants. When referring to the trainer refer to Evan (not Mr. Mangan) . Also, even though the transcript include Evan introducing himself do not include that in the summary.

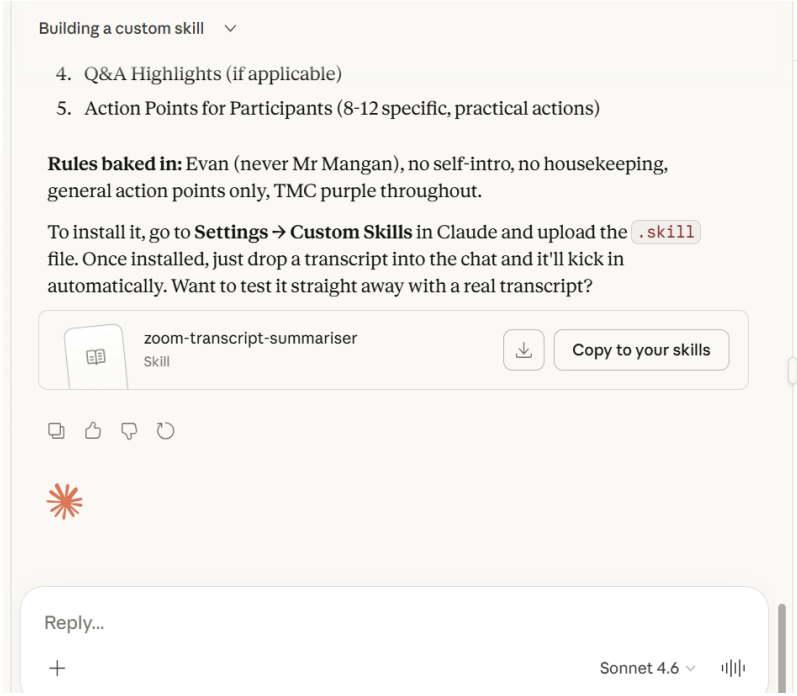
The final summary report should be presented in the chat but will also be converted into a pdf that I can download. It will use the TMC branding skill to ensure that the summary has out logo and uses our brand colours. The logo should be centred on the first page.

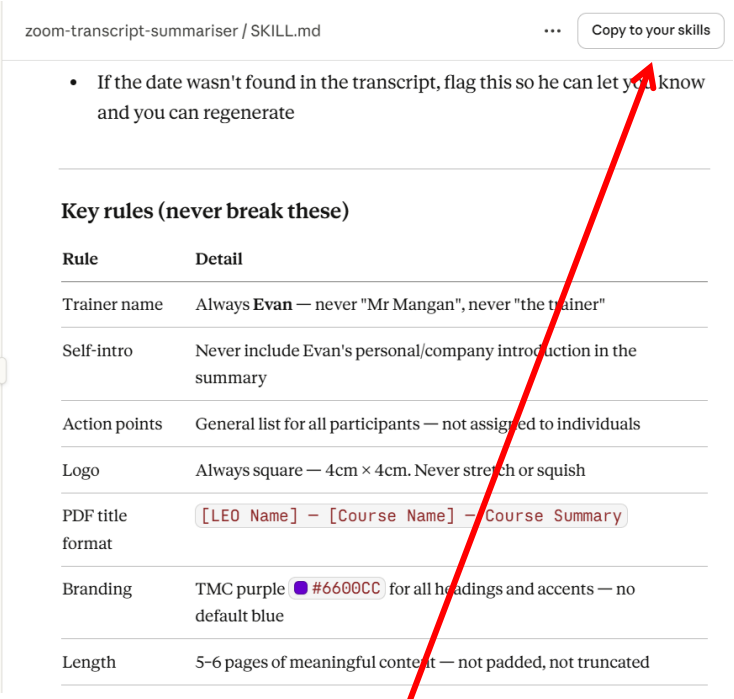
A skill to “Summarise a Zoom transcript into a branded report”



It will then ask you a few questions

A skill to “Summarise a Zoom transcript into a branded report”





It took a few minutes for it to build the skill

Note: You then need to save this skill to your skills. Click on “Copy to your skills”

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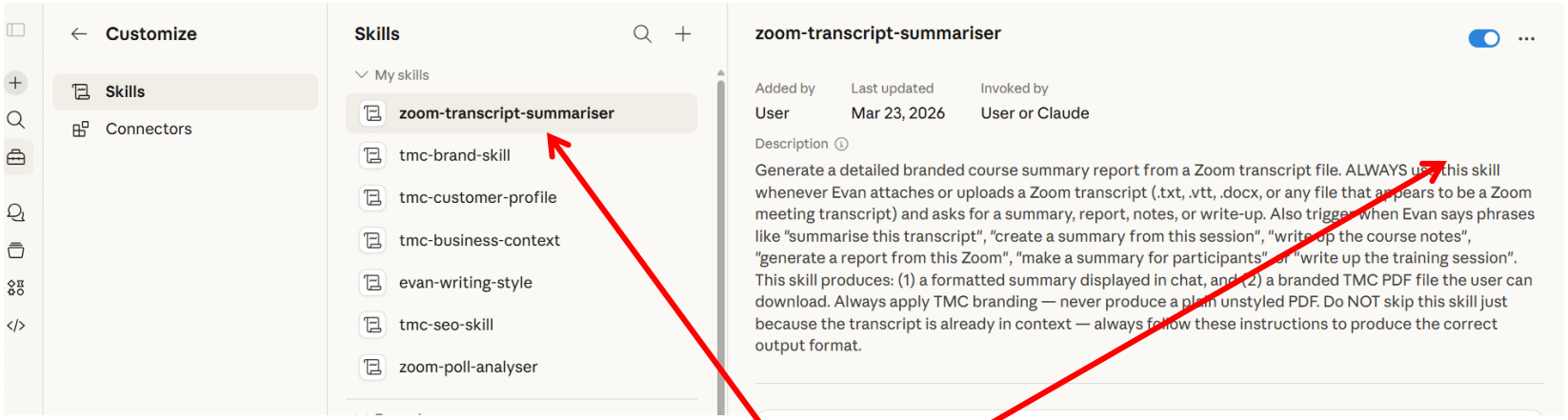
A skill to “Summarise a Zoom transcript into a branded report”



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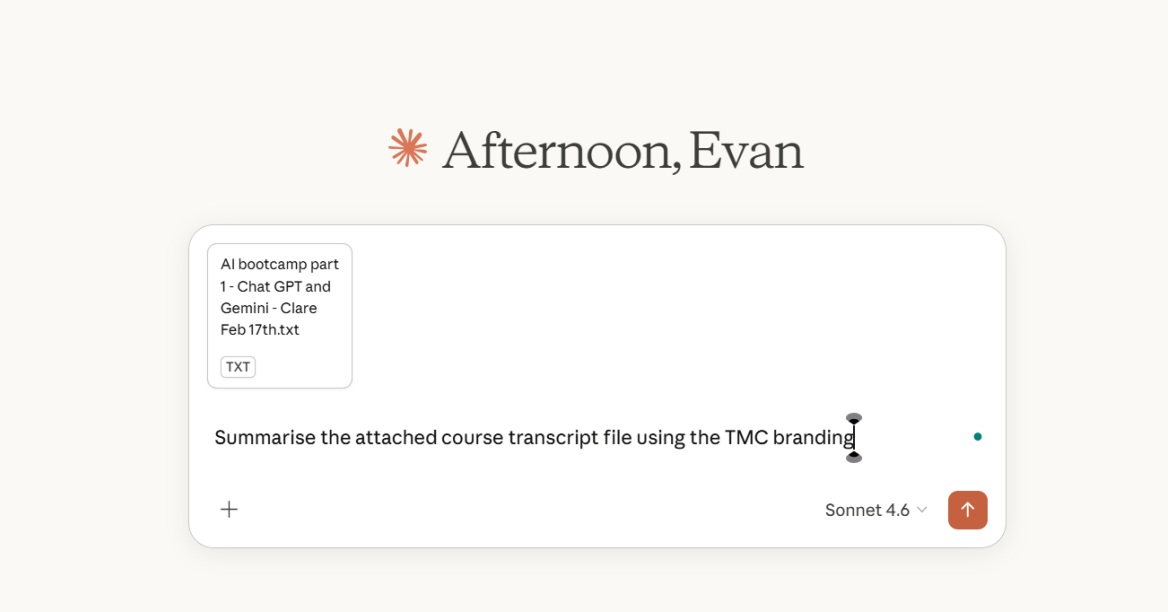


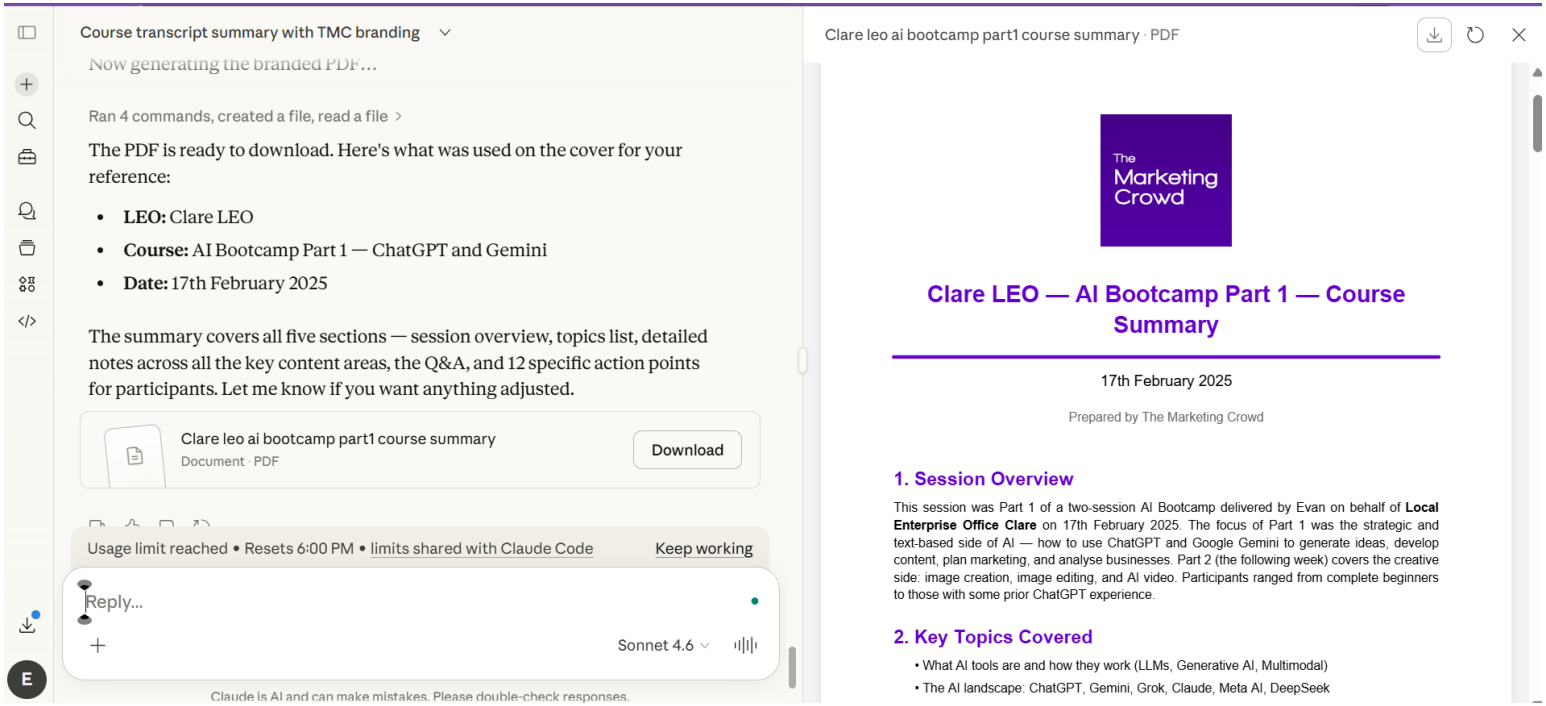
I can attach a transcript and say ...

Summarise the attached course transcript file and use the TMC branding

I am now combining the transcript summary skill and the branding skill

.

What this means



It then gave a course transcript that is a summary AND is branded

.

What Admin type skills could you create?



Ask yourself ...

1. What do I do on my PC regularly that takes a lot of time.

2. Is it very similar each time so it could be repeatable in a skill

3. Does it involve text documents, spreadsheets, reports – if so it could be ideal for a skill

What Admin type skills could you create?

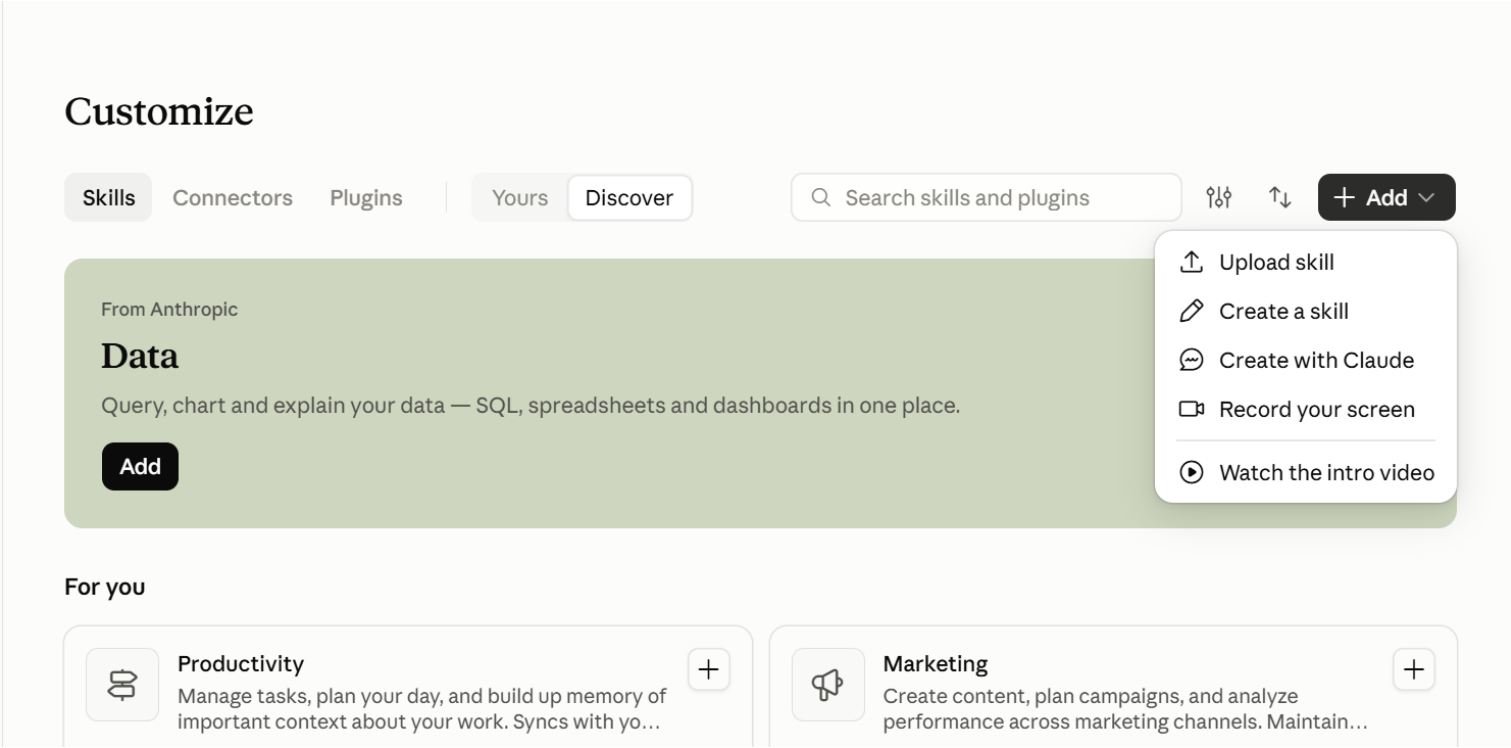


Ask Claude to help you. Use this prompt

I want you to help me identify tasks I do regularly in my business that could be turned into a repeatable Claude skill — a set of instructions that means I never have to explain the same job to Claude twice.
Ask me a series of questions, one at a time, to help me discover these tasks. Focus on:
Things I do on my computer regularly that take a lot of time
Tasks that follow a similar pattern each time
Any work involving text documents, spreadsheets, reports, emails, or social media posts
Things I dread doing because they're repetitive and boring
After asking me your questions, give me a ranked shortlist of my top 3 skill candidates, explain why each one would work well, and suggest what I should name each skill."

Claude

You can now record a skill in Claude



You can record yourself doing things on your PC and speak out loud to provide instructions and explanation for what you are doing. Claude will then watch the video and will turn what you did into a repeatable skill

Claude
You can now record a skill in Claude

#	Skill you could create	What you would show and explain	What you could ask Claude to do next time
1	**Write a new product listing**	Take one product from supplier notes to a finished website listing. Explain which details matter and how you write the title.	"Use my product listing skill for these five new products."
2	**Turn a new product into social posts**	Show how you choose the strongest benefit, write an Instagram caption and adapt it for Facebook.	"Here's our new product. Create the posts in our usual style."
3	**Create a weekly email offer**	Walk through how you choose the subject line, opening, featured products and call to action.	"Use my email skill to draft this week's campaign."
4	**Reply to common customer enquiries**	Demonstrate how you answer questions about availability, delivery or appointments and when you need to check something first.	"Draft replies to these enquiries using our usual approach."
5	**Make a quote or proposal**	Show how you turn an enquiry into a quote with the scope, price, timing and next step.	"Use my quote skill for this new enquiry."

Some ideas for things you could record

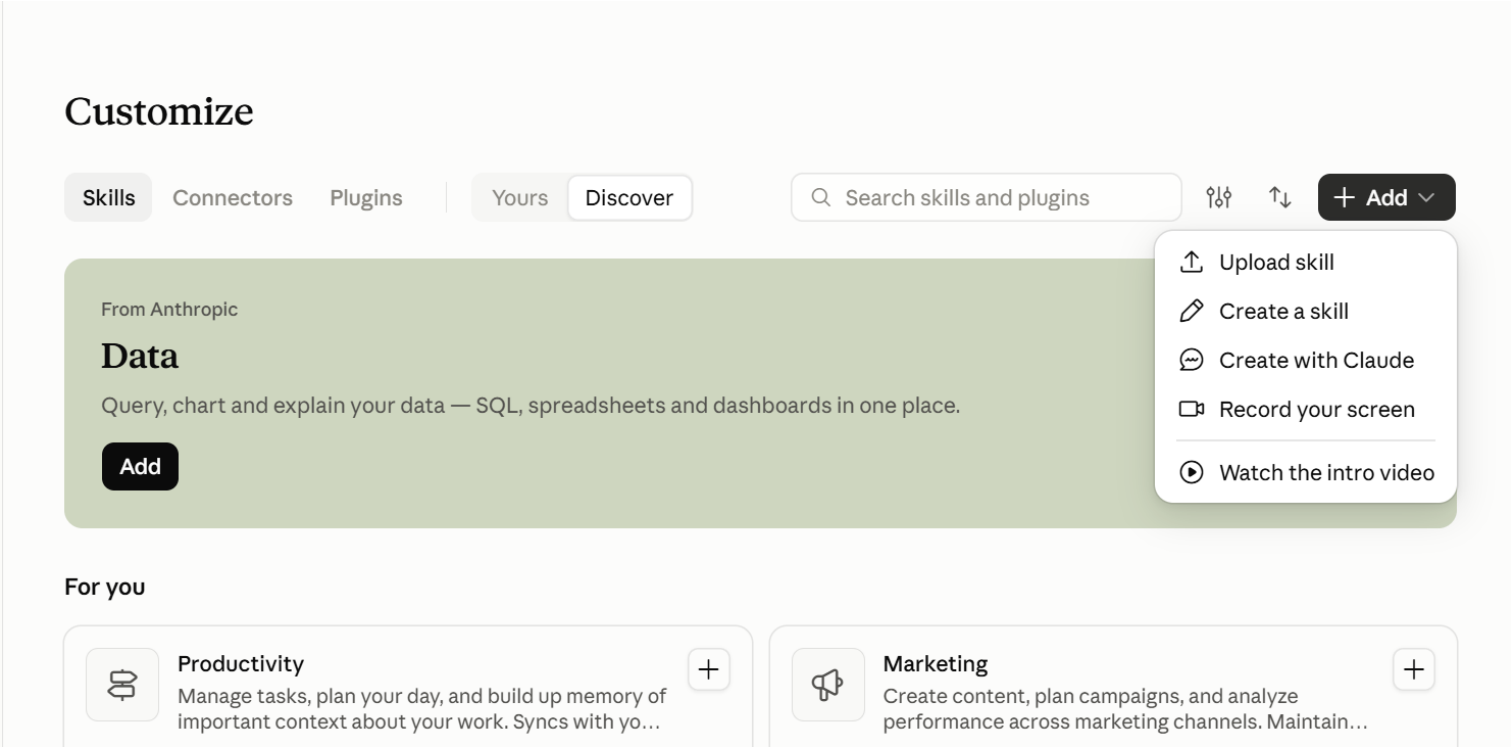
Claude
You can now record a skill in Claude

6	**Create content from one topic**	Show how you turn one customer question into a Reel idea, a post, a Story and an email tip.	"Use my content skill for the topic 'How to choose the right size'."
7	**Check the weekly sales figures**	Open a sample sales export and explain which figures you check and what would prompt you to take action.	"Use my weekly sales review skill on this week's export."
8	**Turn reviews into marketing ideas**	Show how you spot recurring customer comments and turn them into posts, FAQs or website improvements.	"Review these comments using my customer feedback skill."
9	**Create a promotion checklist**	Demonstrate how you plan the website changes, emails, social posts and final checks for an offer or event.	"Use my promotion checklist skill for our October event."
10	**Train a new staff member on a routine task**	Record how you complete a task and explain the decisions that a written checklist might miss.	"Create a simple training guide and checklist from my skill."

Some ideas for things you could record

Claude

You can now record a skill in Claude



However, to use this you must

1. **Use the desktop app –not the website**
2. **Be in CoWork mode**

The MARKETING CROWD

USING AI FOR TASKS
CREATING FILES & DOING JOBS
Which Level Are You At?



1 Identify tasks an AI can help you do
You have made a list of tasks in your job that an AI can help you with.

The MARKETING CROWD

USING AI FOR TASKS
CREATING FILES & DOING JOBS
Which Level Are You At?



2 Create Skills The AI Can Use
You have created skills (Brand. writing style, Business contcct) that AI can use when implementing repetitive tasks.

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The MARKETING CROWD

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3 Tasks Using The Web Version
You write a prompt and the AI applies your custom skills (brand, writing style, business context) to complete the task.

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You have made a list of tasks in your job that an AI can help you with.

What we will cover

About Claude
- What is Claude?
- What makes Claude different?
- The three main areas within Claude: Chat, CoWork and Code
- Free and paid versions of Claude

Claude Chat: Elements that are similar to Chat GPT and Gemini
- Fast and thinking models, personalisation and projects

Claude Chat: Key features you should understand
- Credits system
- Skills

Claude CoWork – Demonstration of how to use this AI Agent
- How to install it in your PC
- Overview of the navigation
- Ways you can use CoWork

Agentic AI – This is the next big stage in AI development



Currently, most people use AI tools to answer questions

Agentic AI is when the AI completes a task for you.

This is the next big stage in AI and there have been some Agentic AI tools available since last year. Two of the main ones include Manus and Chat GPT agent Mode

You give the agent a task and it will figure out the best way to do it

1. Find (or book) a hotel in Dublin for this date for 2 nights within my budget of €400 and it has to be pet friendly

It will go off, do the research and come back with option. If you want it can book it for you as well.

Agentic AI – This is the next big stage in AI development



Issues with Agentic AI to date

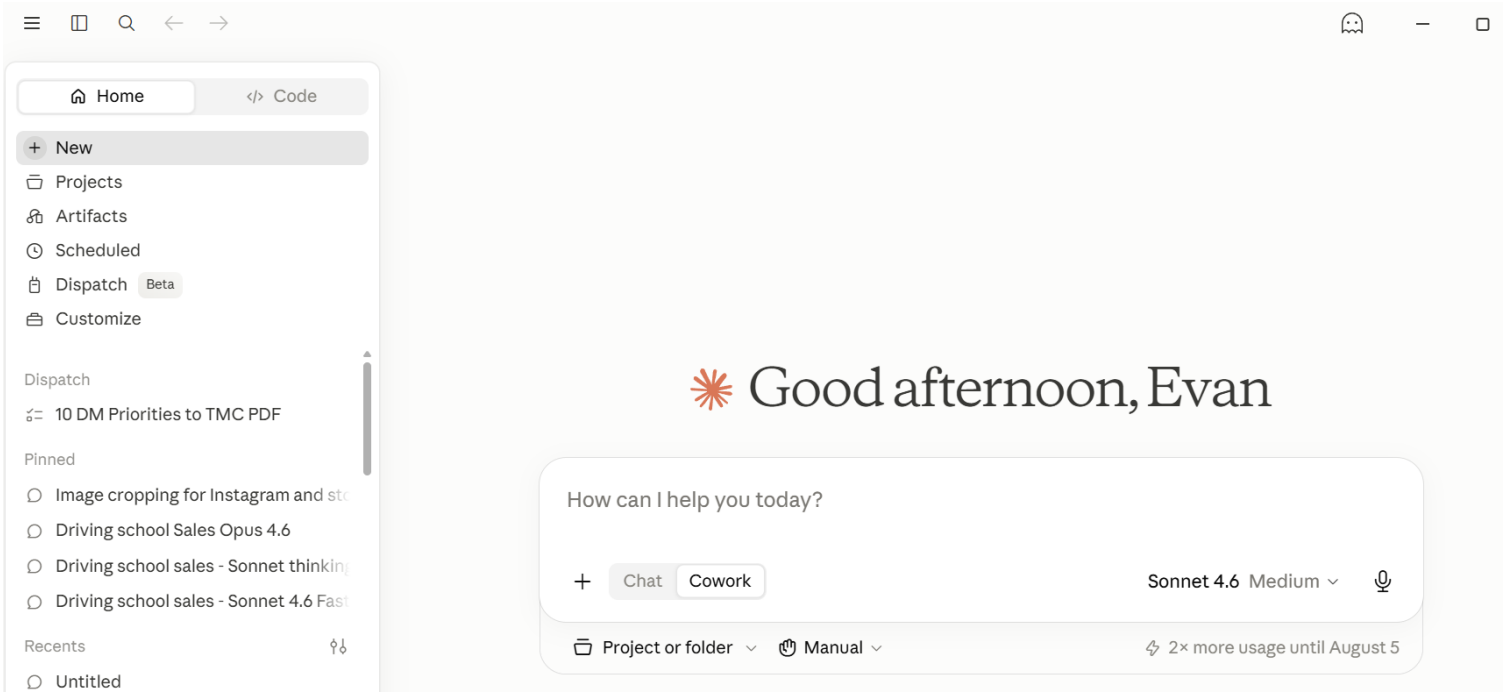
1. When it gets to a website that requires a login it cannot. You have to login. However, it can then see your logins. Do you want that?

2. Do you want an AI agent to buy with your credit card?

3. Quite often if the task involves going to websites and doing something for you the agent will get stuck and cannot complete the task.

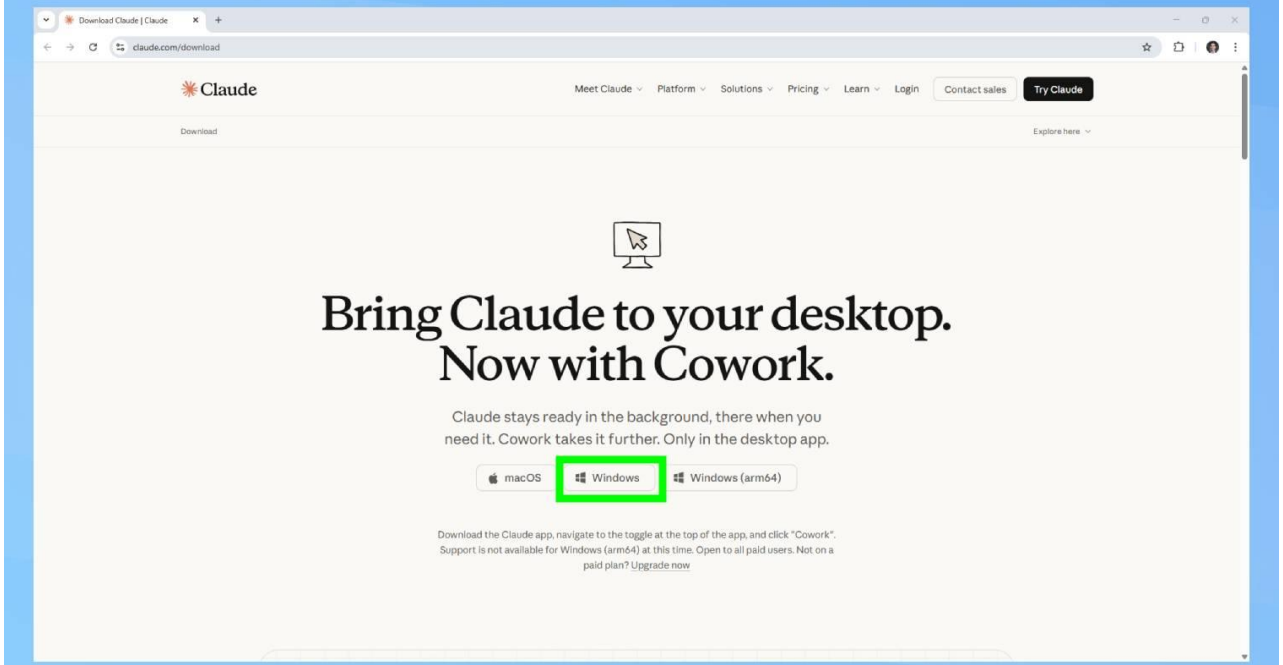
So, a lot of the AI agents in 2025 were not as developed and as useful as initially hyped.

Claude Co Work – The best and easiest to use currently



In January 2026 Claude released Cowork which is an AI agent that can do things for you. This has been hugely popular and marks a leap forward in terms of Agentic AI. You will hear a lot about Claude CoWork

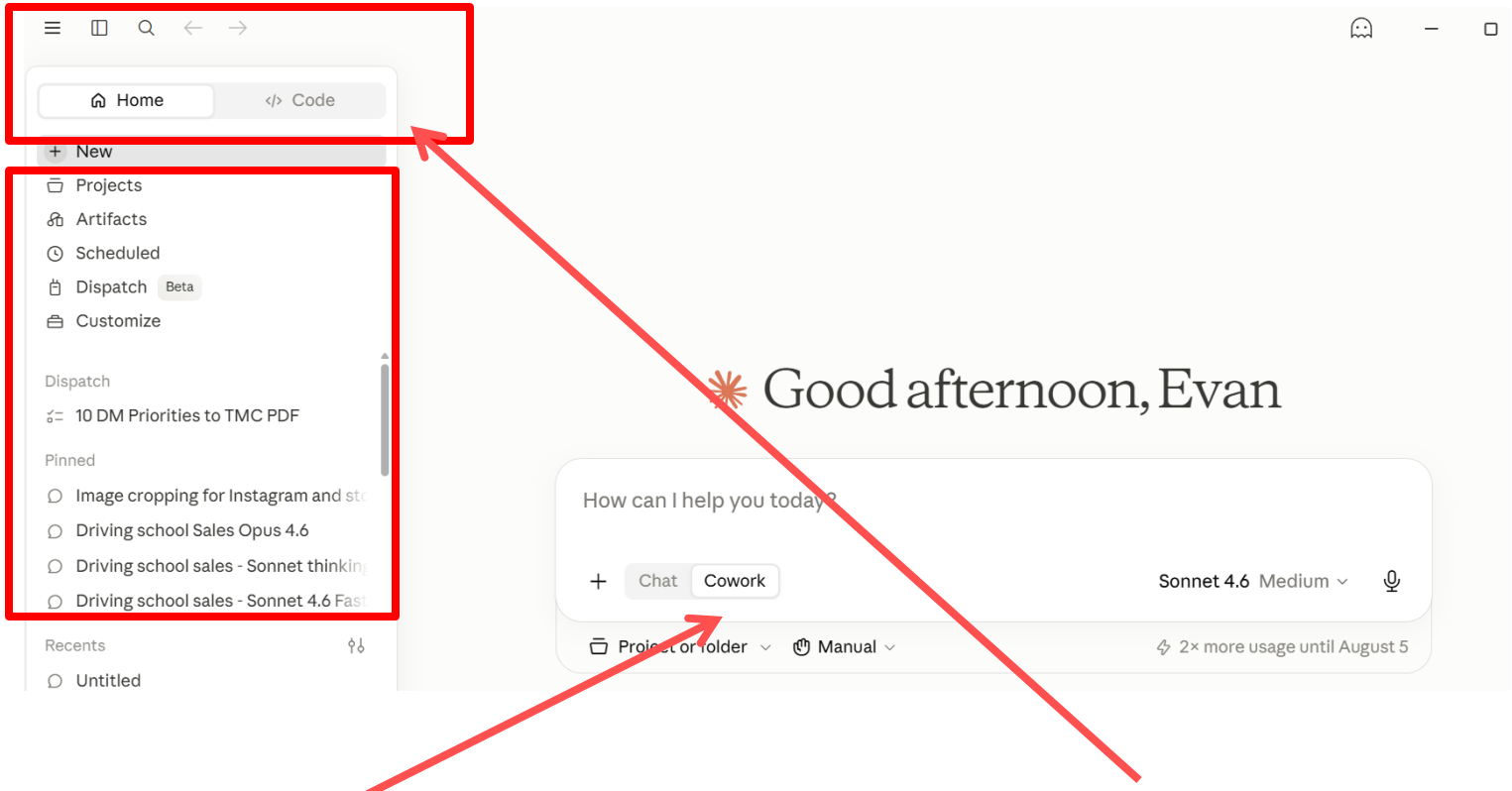
How to install CoWork



Note: You have to have a paid plan – you currently cannot use this on the free plan

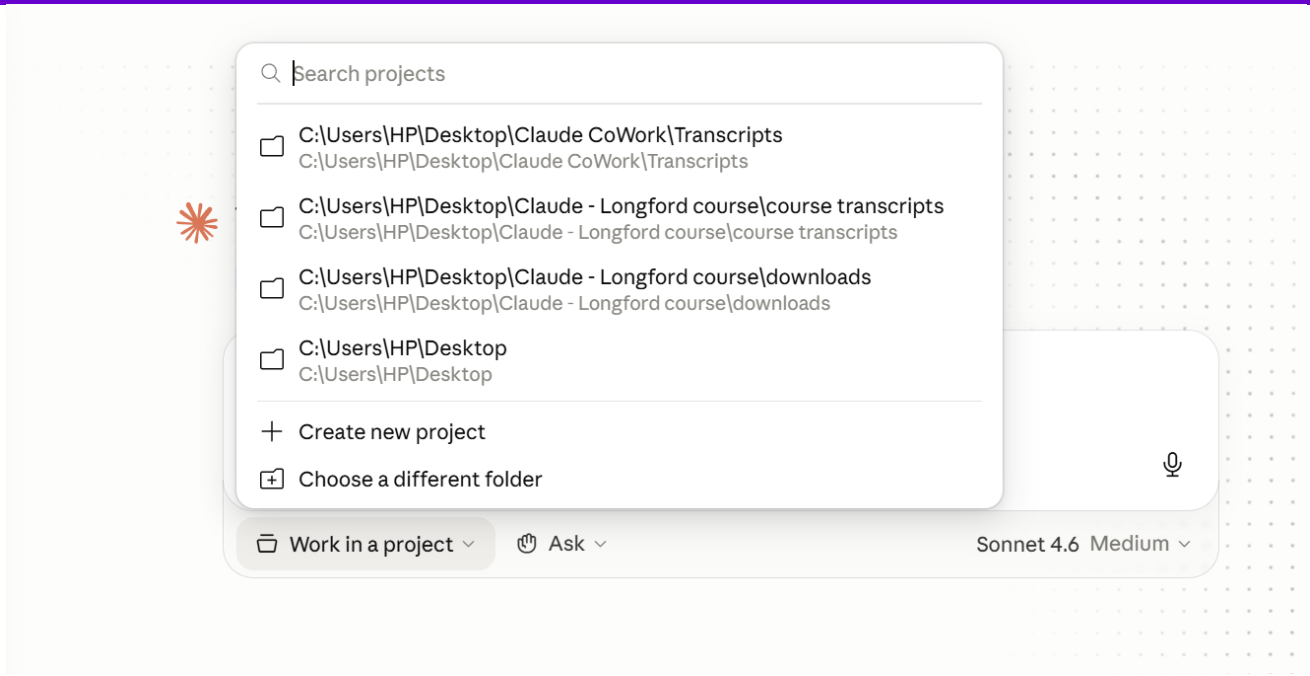
When you are logged into Claude.ai on your paid plan, look for an option that says Download CoWork. You can install it on windows PC or Mac. Choose the relevant option and then follow the prompts. It is like installing any software on your device.

Overview of the navigation



Notice – at the top there are options for Home (Chat, CoWork) and Code.
When on Home you will select Cowork
You have a menu down the left which is very similar to web version
You can click on your name for settings – all your web settings are carried through to this app

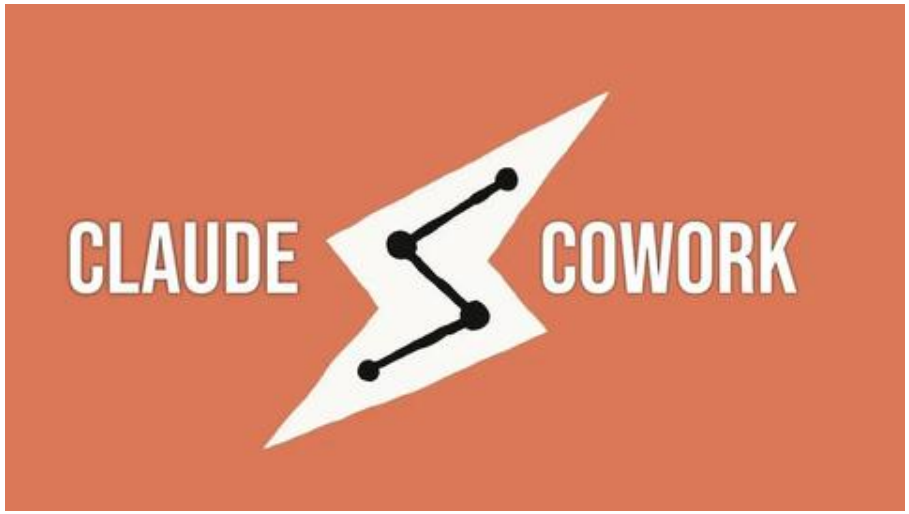
Overview of the navigation



The main difference with CoWork is that you get it to work in a folder on your PC / Mac

1. Create a folder on your PC / Mac
2. Then copy in files that you want Claude to work on.
3. Then write a prompt in the box asking it to do something. Claude will then look at the files in the folder and if you ask it to create someone it will place it in that folder
4. You can then ask it to repeat the process on a regular basis

How could you use Claude CoWork?

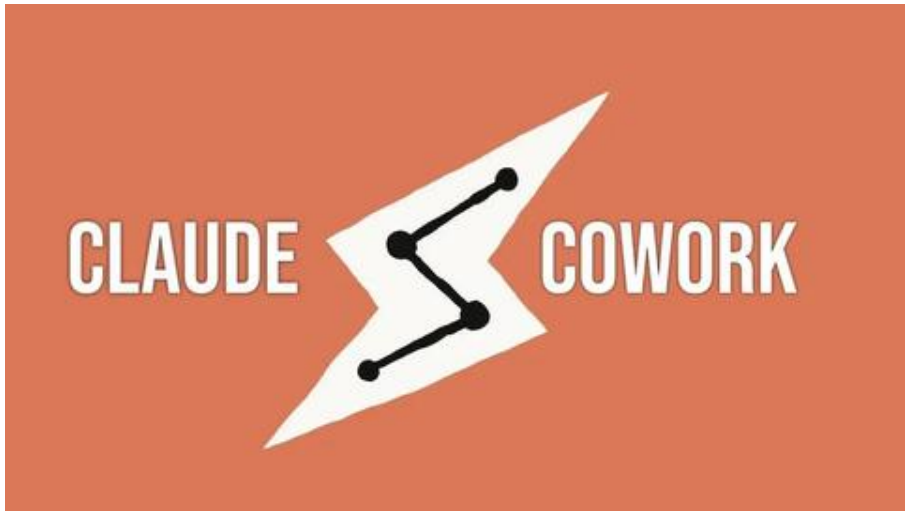


What Claude Cowork Actually Is
Think of Claude Cowork as a digital employee — not a chatbot.

It has:
Eyes → can see your files and screens
Hands → can move files, edit content, and use apps
Brain → can make decisions and complete tasks

It doesn't just answer questions. It gets real work done on your computer.

How could you use Claude CoWork?



Basic Digital Housekeeping on your PC

Start simple. Save time on small, repetitive jobs.

Clean up messy folders
Ask it to organise your desktop
Example: move all images into one folder, PDFs into another

Rename files properly
Ask it to scan the images or screenshots in a folder and rename them. Give it an example such as Turn “Screenshot 123” into “Instagram Offer Graphic”

Uses image recognition to understand what the file is

Difficulty: Easy
- Simple prompts
- No setup required

The MARKETING CROWD

USING AI FOR TASKS
CREATING FILES & DOING JOBS
Which Level Are You At?



4 Basic Tasks On Your PC
Claude CoWork is working in a folder on your PC and you can schedule it to repeat simple tasks eg. file maintenance, generating weekly reports

3 Tasks Using The Web Version
You write a prompt and the AI applies your custom skills (brand, writing style, business context) to complete the task.

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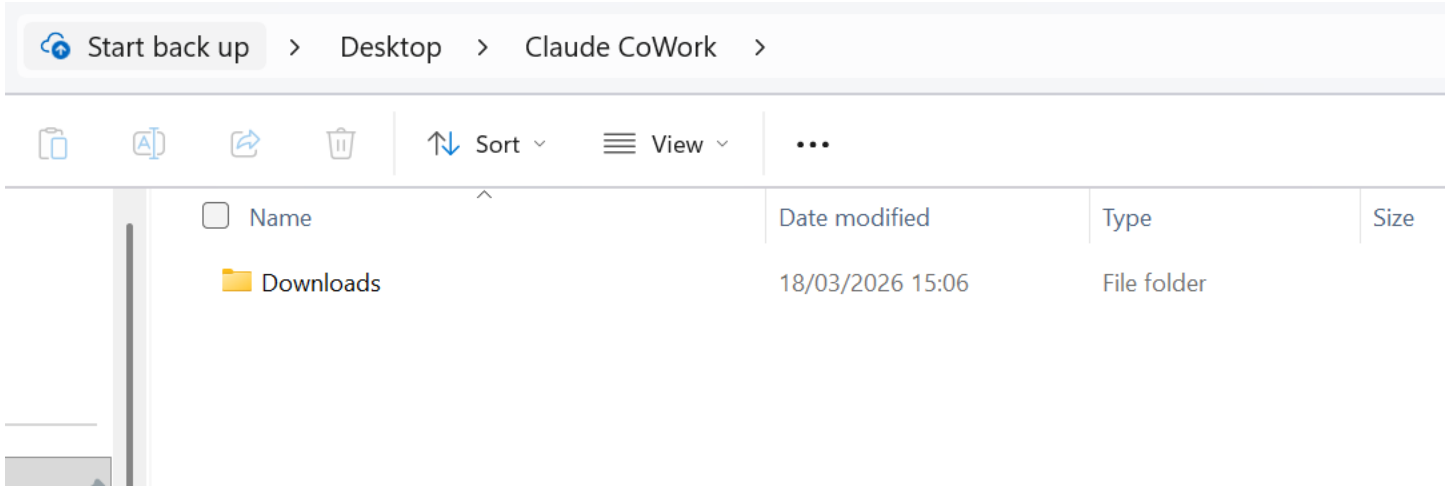
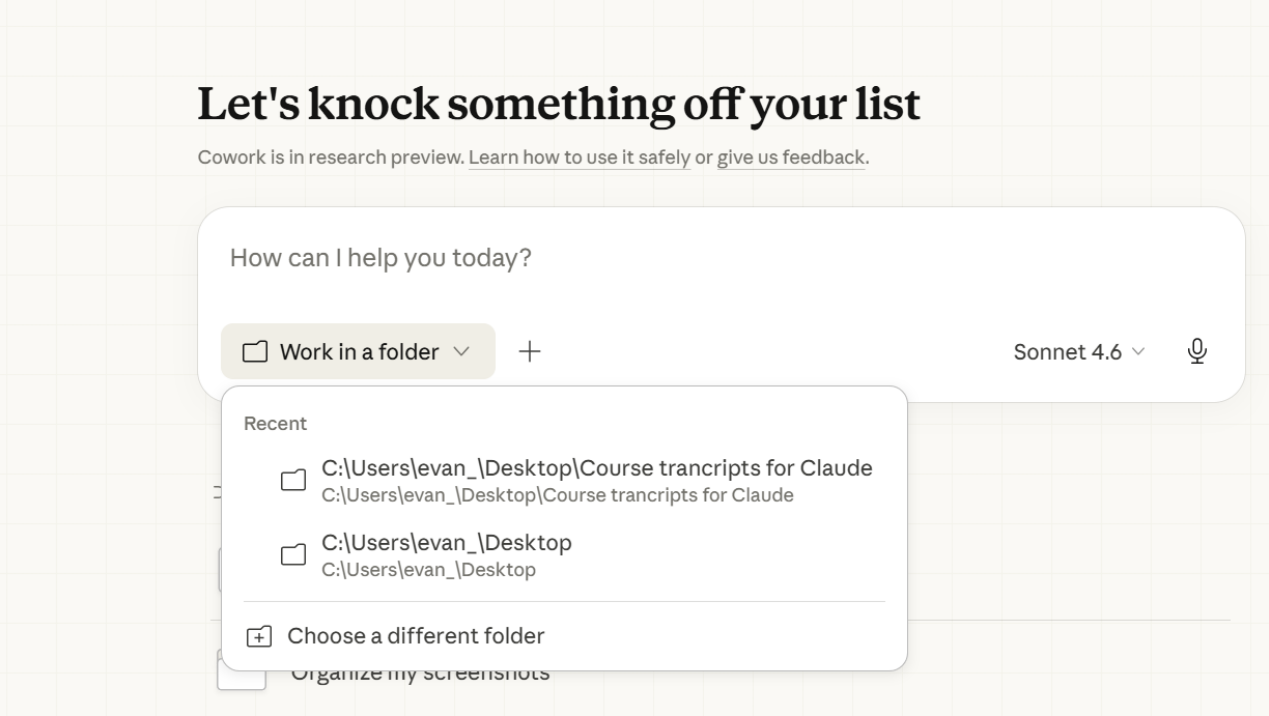
How To Get It To Do Basic Digital Housekeeping on your PC



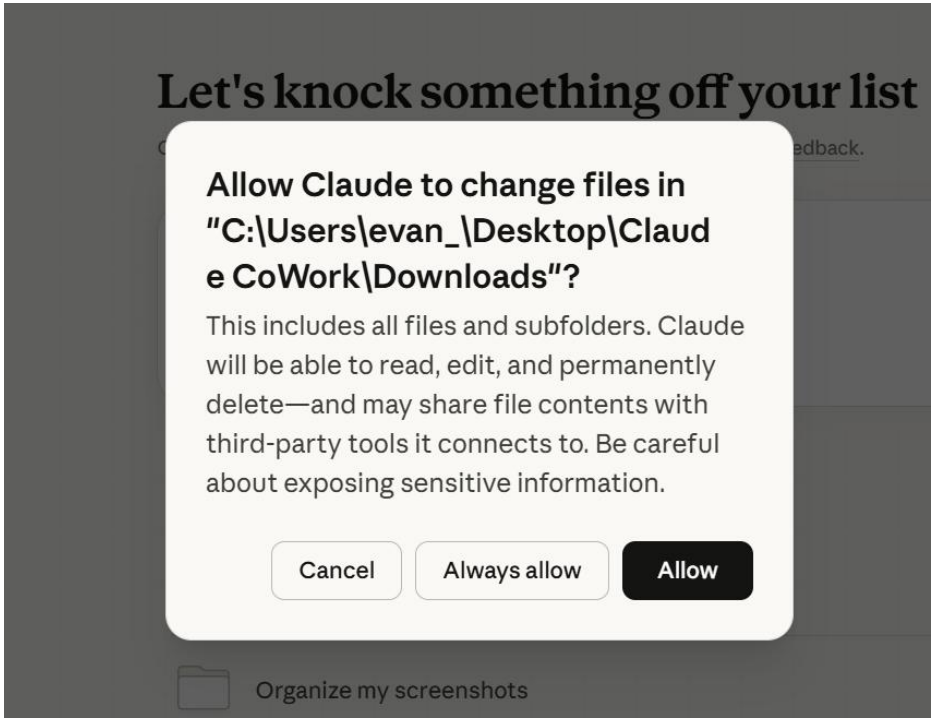
- Create a folder on your desktop for Claude to work in.
- Call it anything you want. I called it Claude CoWork
- Inside that folder create a folder that you will place files into that it will work on. I created a folder called Downloads because I want it to analyse and sort everything in my downloads folder
- Copy all the files that you want it to work on into that folder

How To Get It To Do Basic Digital Housekeeping on your PC



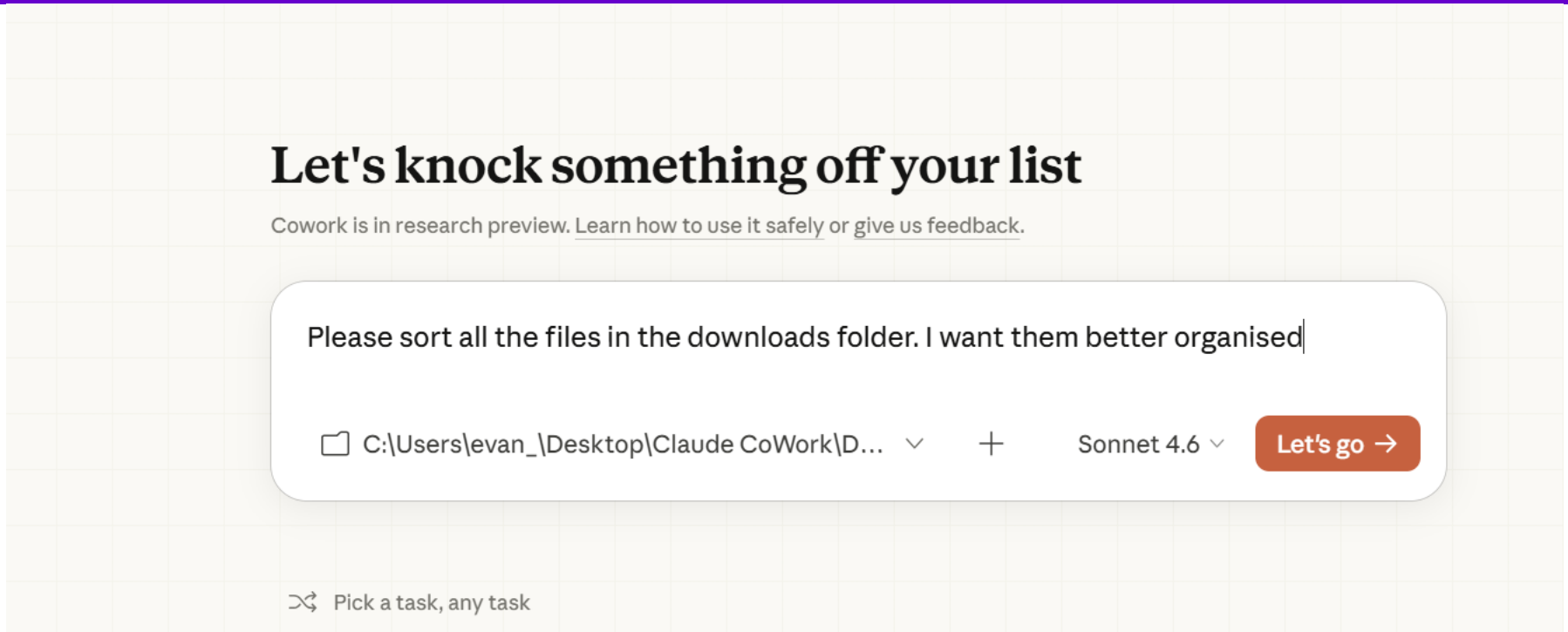
- In the Claude app on your PC click on Work in folder
- It will show you previous folders you asked CoWork to work in
- Click choose a different folder if it’s a new folder you want it to work in

How To Get It To Do Basic Digital Housekeeping on your PC



- When I selected the folder, I was then asked to give it permission
- I clicked Always allow as I might want it to back to the folder on a schedule e.g. Every month.

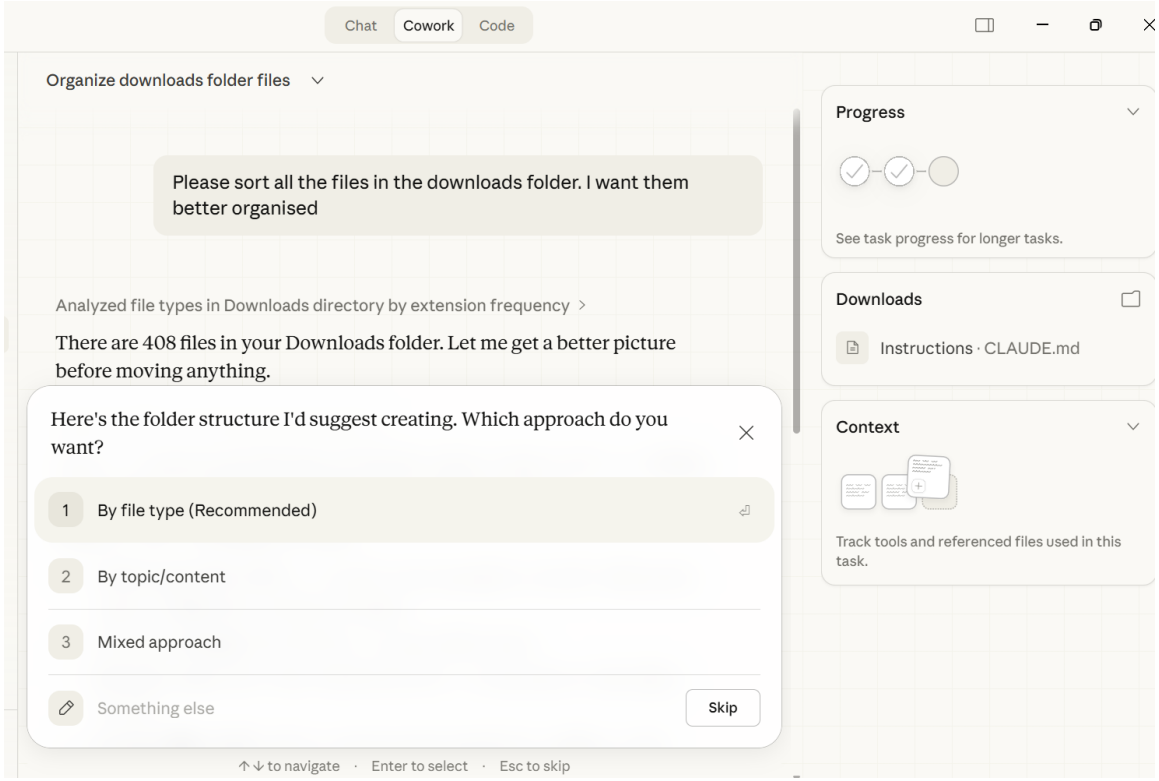
How To Get It To Do Basic Digital Housekeeping on your PC



Now that the folder is selected I typed in my prompt and then clicked Lets Go

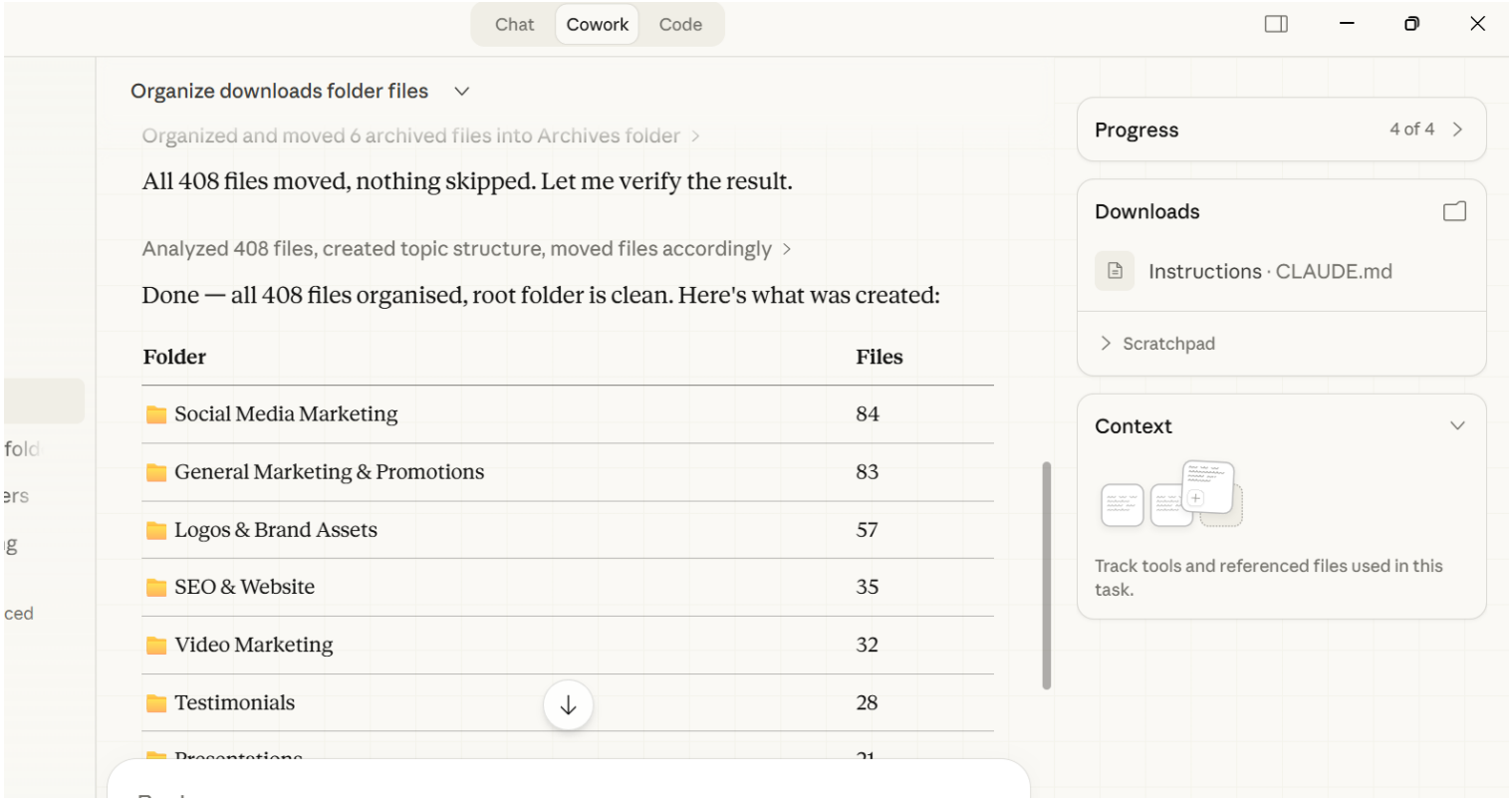
Please sort all the files in the downloads folder. I want them better organised

How To Get It To Do Basic Digital Housekeeping on your PC



Within a minute or so it told me how many files, the breakdown of the files images, docs etc.
It then asked me a question
I selected “By Topic”

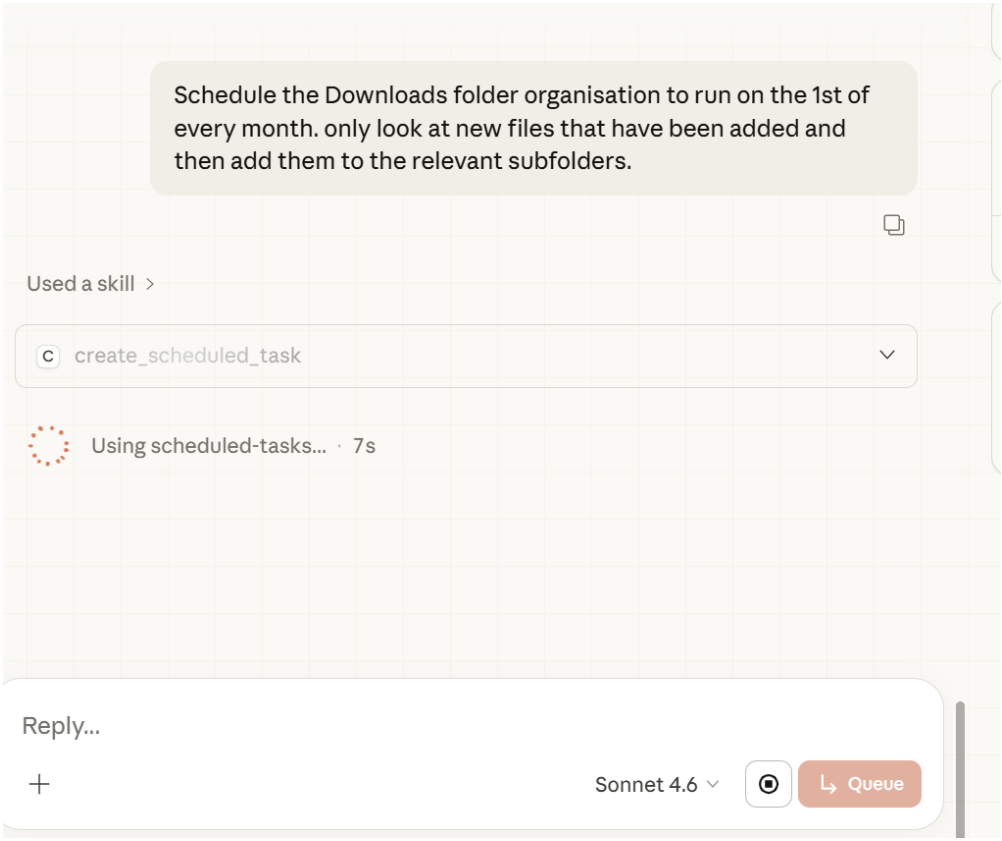
How To Get It To Do Basic Digital Housekeeping on your PC



Within 3-4 minutes it completed the task and gave me a breakdown

When I checked the actual folder they were all organised into subfolders

How To Get It To Do Basic Digital Housekeeping on your PC



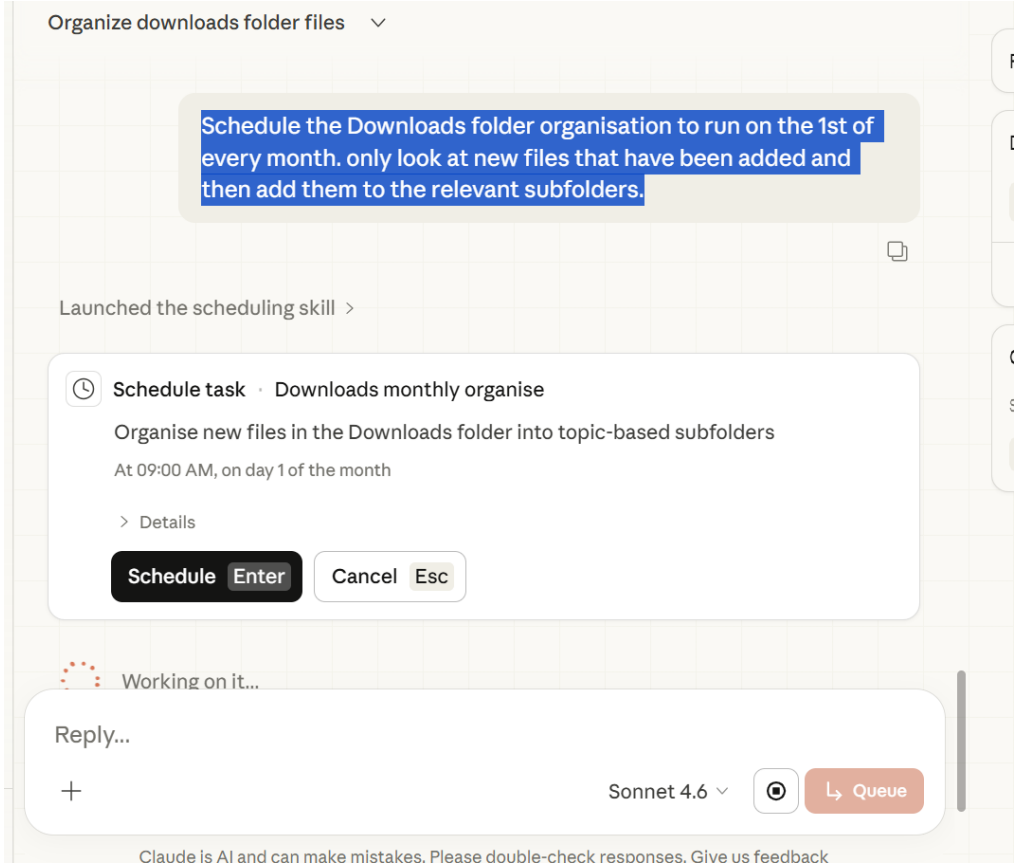
I can easily schedule this to be done monthly.

I typed in this prompt

Schedule the Downloads folder organisation to run on the 1st of every month. only look at new files that have been added and then add them to the relevant subfolders.

It then started to create a skill that it will use in the future and it started to schedule

How To Get It To Do Basic Digital Housekeeping on your PC



It then asked me to confirm that I wanted this to be scheduled

What else could you ask it to do on your PC?

File & Folder Management

- Moving photos off of your desktop into dated folders
- Archiving old files by year
- Identifying duplicate files and then deleting all except one

Admin & Documents

- Filing invoices into monthly folders automatically
- Archiving old quotes or proposals by year

Maintenance Tasks

- Flagging files that haven't been opened in 12+ months (candidates for deletion)
- Checking a folder for files over a certain size that might be clogging up storage

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3 Tasks Using The Web Version
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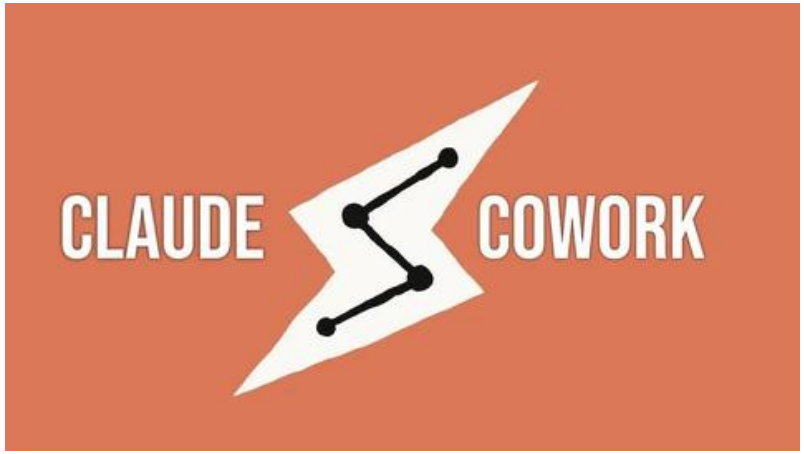
2 Create Skills The AI Can Use
You have created skills (Brand. writing style, Business contcct) that AI can use when implementing repetitive tasks.

1 Identify tasks an AI can help you do
You have made a list of tasks in your job that an AI can help you with.

How could you use Claude CoWork?



Convert Zoom transcripts into summary documents

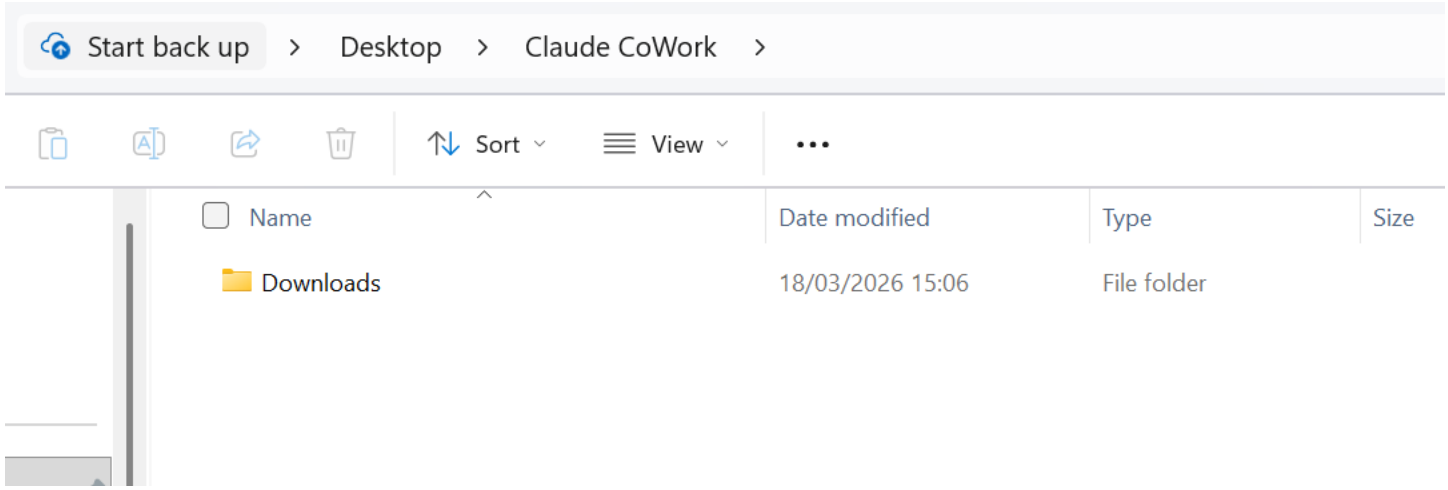
This is what I used Claude for on the web version using Chat

But why do it in CoWork rather than using Claude Chat on the web version?

Instead of uploading and downloading files and writing a prompt in the web version ...

1. I can save a file each day into the folder and then schedule CoWork to check each day at 5Pm and it will find it and just do the report
2. It will use all of the skills that I have created in Claude Chat
3. I could put 50 files into the folder and CoWork would work its way though all of them
4. I can just tell CoWork to “Go” to the folder and it will know what to do and do it
5. CoWork will save all of the created files in subfolders on my PC.

How To Get It To Create A Report / Document / Analysis file



- Create a folder on your desktop for Claude to work in.
- Call it anything you want. I called it Claude CoWork
- Inside that folder create a folder that you will place files into that it will work on. I created a folder called Course Transcripts because I want it to analyse and summarise any transcript that I place in that folder
- Copy any files that you want it to work on into that folder

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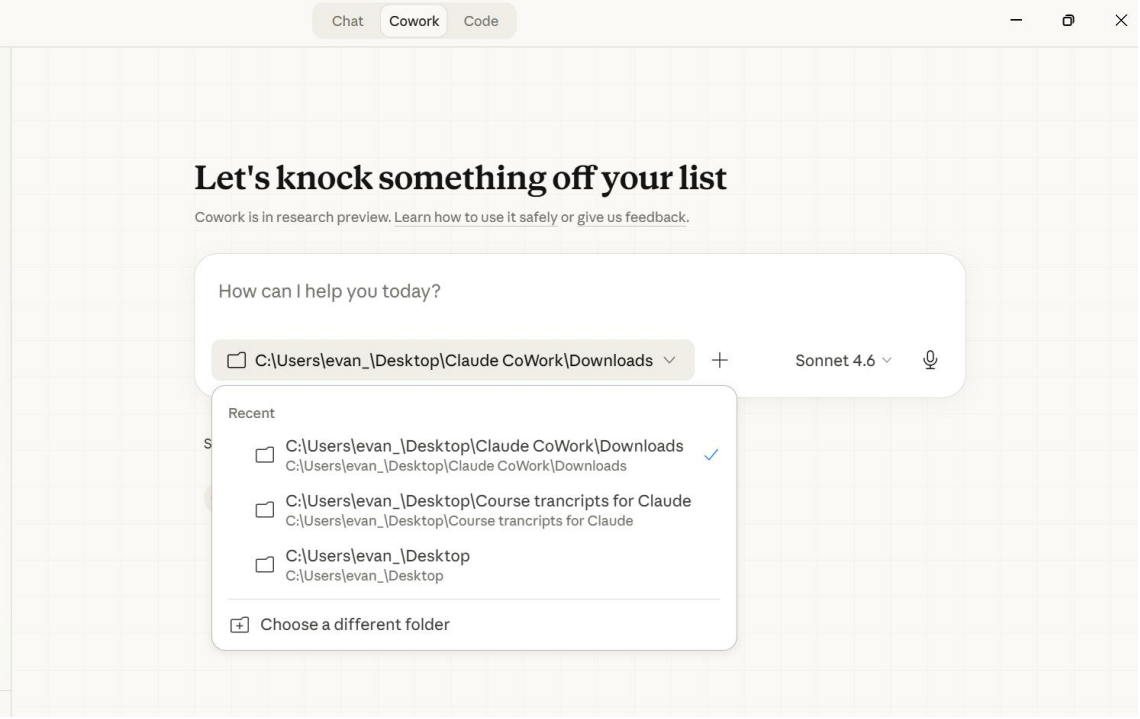
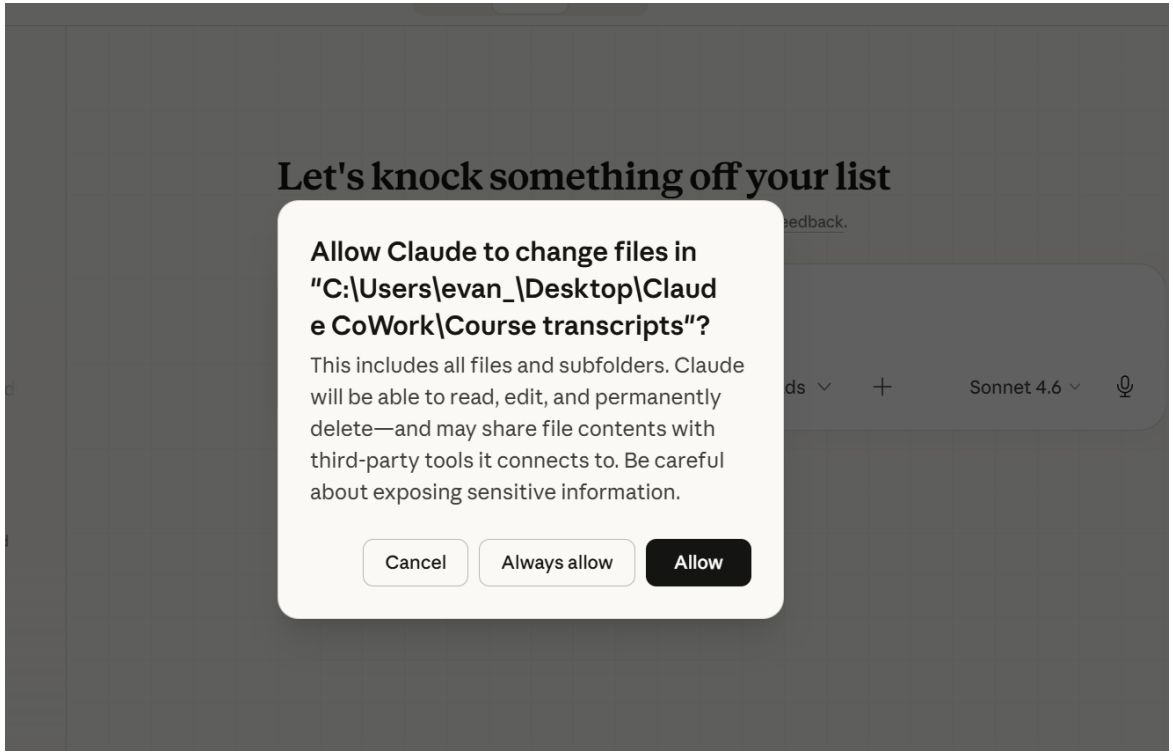


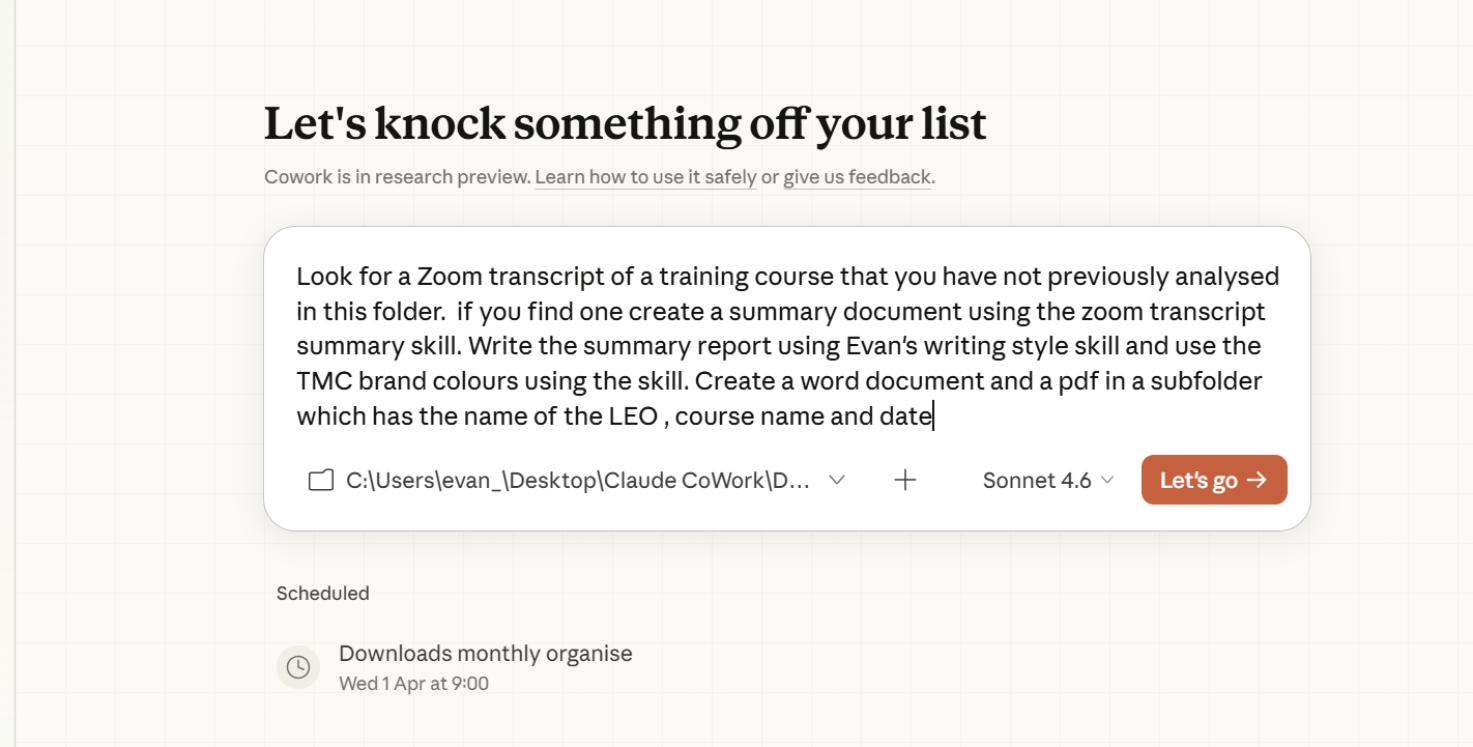
- In the Claude app on your PC click on Work in folder
- It will show you previous folders you asked CoWork to work in
- Click choose a different folder if it's a new folder you want it to work in

How To Get It To Create A Report / Document / Analysis file



- When I selected the folder, I was then asked to give it permission
- I clicked Always allow as I might want it to back to the folder on a schedule e.g. Every month.

How To Get It To Create A Report / Document / Analysis file



Now that the folder is selected I typed in my prompt and then clicked Lets Go

Look for a Zoom transcript of a training course that you have not previously analysed in this folder. if you find one create a summary document using the zoom transcript summary skill. Write the summary report using Evan's writing style skill and use the TMC brand colours using the skill. Create a word document and a pdf in a subfolder which has the name of the LEO , course name and date

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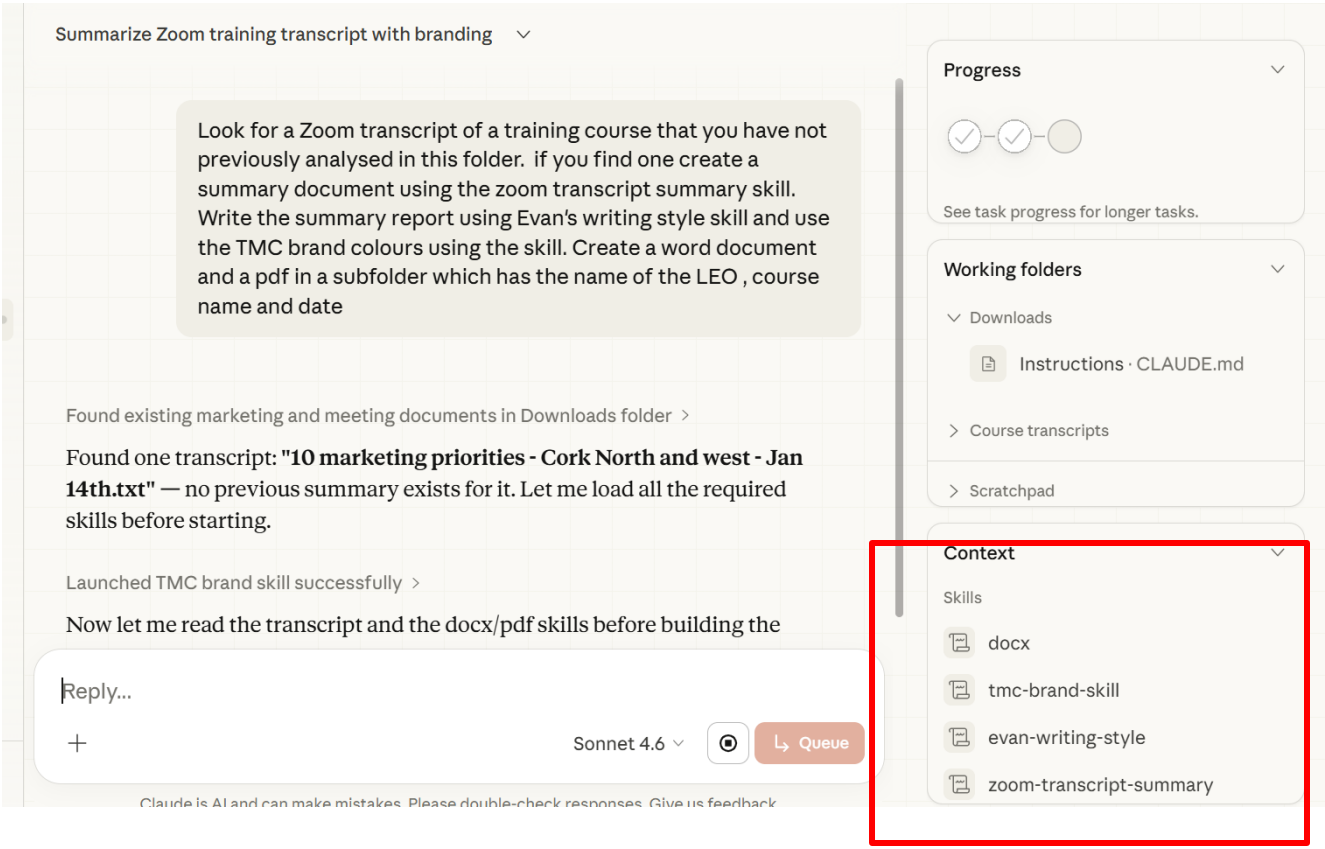

Within a minute it told me that if found one transcript file.

Note – if I had 30 files in that folder it would generate 30 different summary files for me

Note – it is also listing the skills that it will use. Check that it is using the skills that you want

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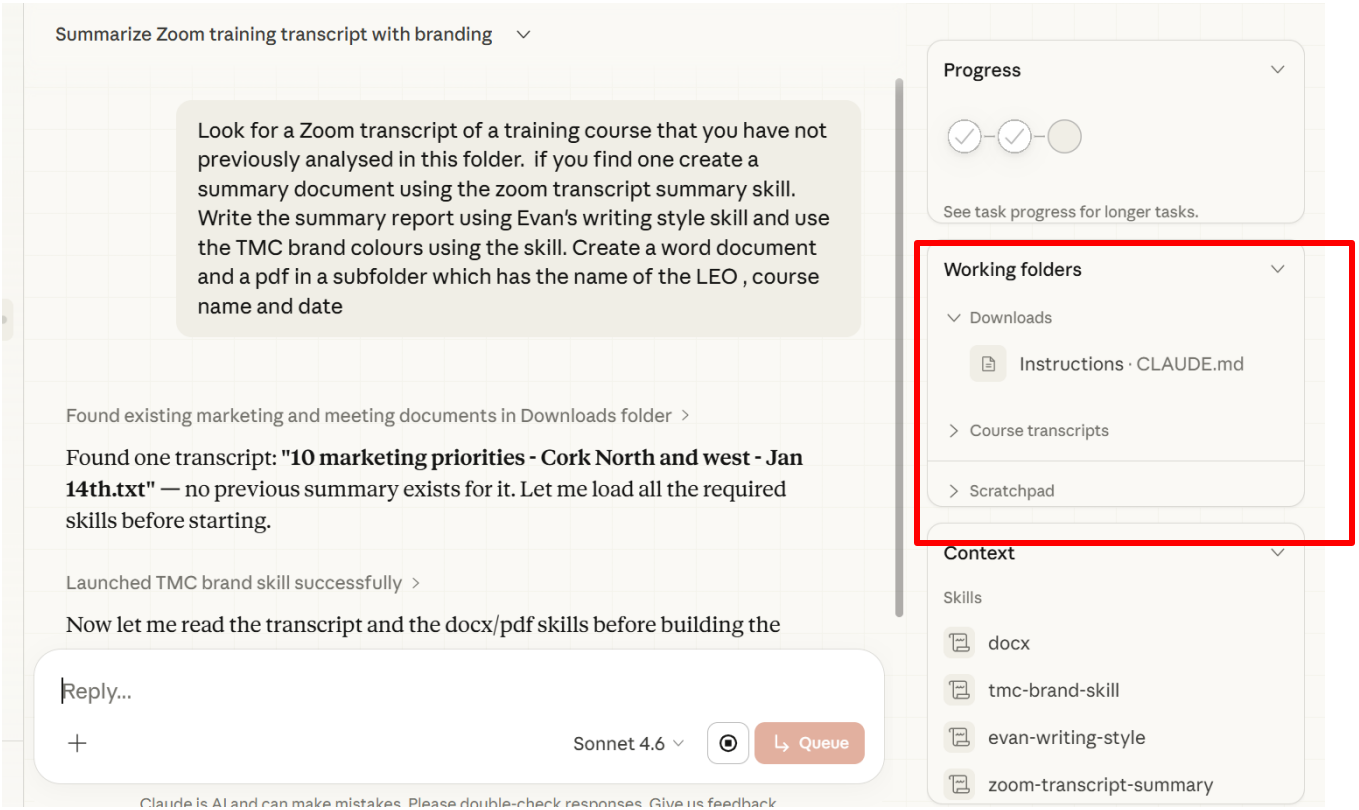
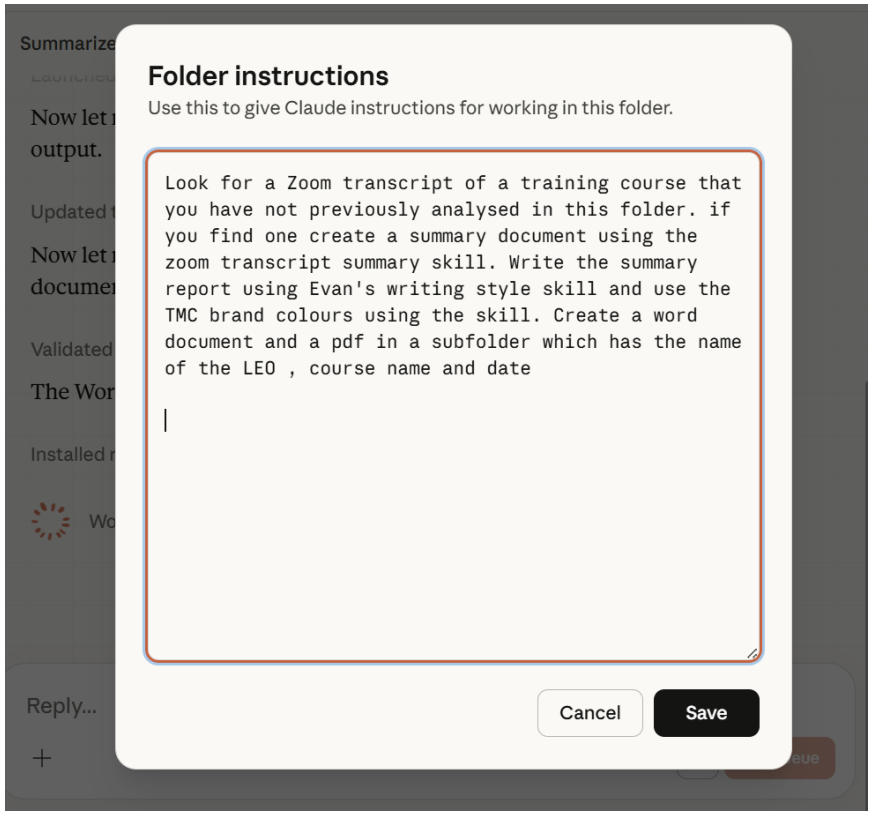


Pro tip

If you want Cowork to go back to this folder regularly to do this job, write instructions for the folder. Click on the instructions file (claude.md)

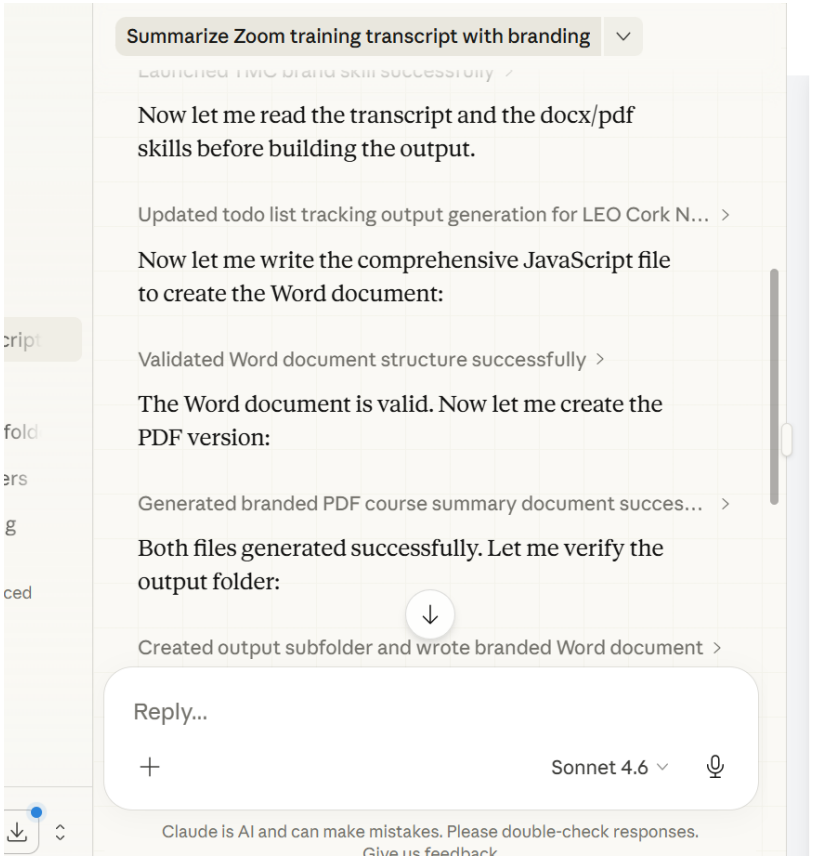
How To Get It To Create A Report / Document / Analysis file

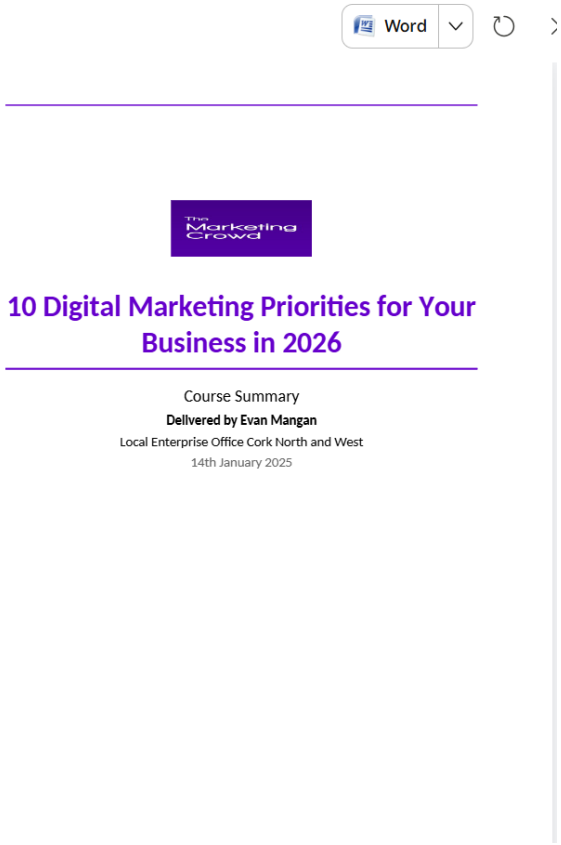


Pro tip

I then pasted in my instruction which is really my initial prompt
Anytime Cowork goes to that folder it will read those instruction
It also means that I can select that folder and simply type "Go" . It will then read the instructions

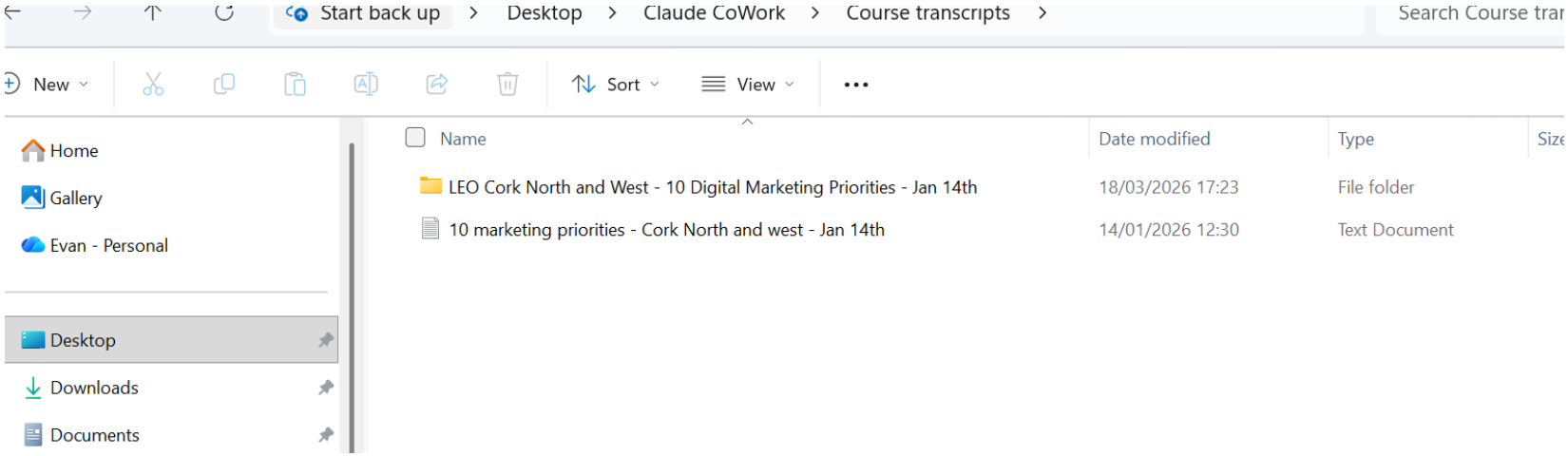
How To Get It To Create A Report / Document / Analysis file





Within 4-5 minutes the summary report what created

How To Get It To Create A Report / Document / Analysis file



The subfolder was created and the word doc and pdf was placed in there

Important to remember – if I had 50 transcript files it would folder work its way though them all and would generate 50 different summary reports for me

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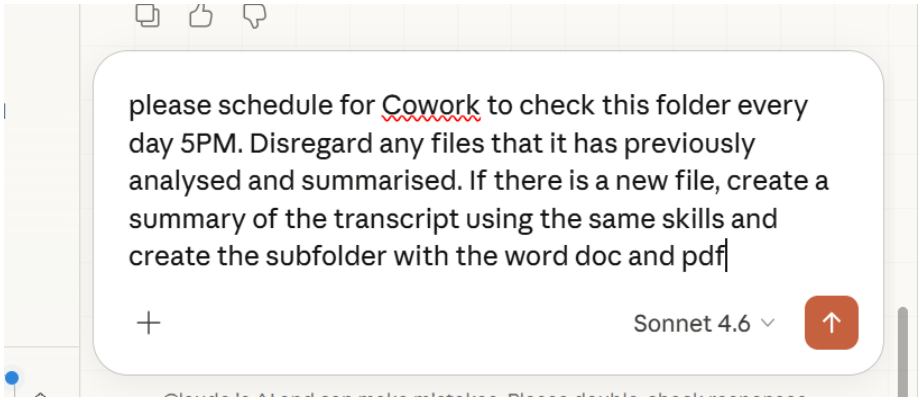
How To Get It To Create A Report / Document / Analysis file



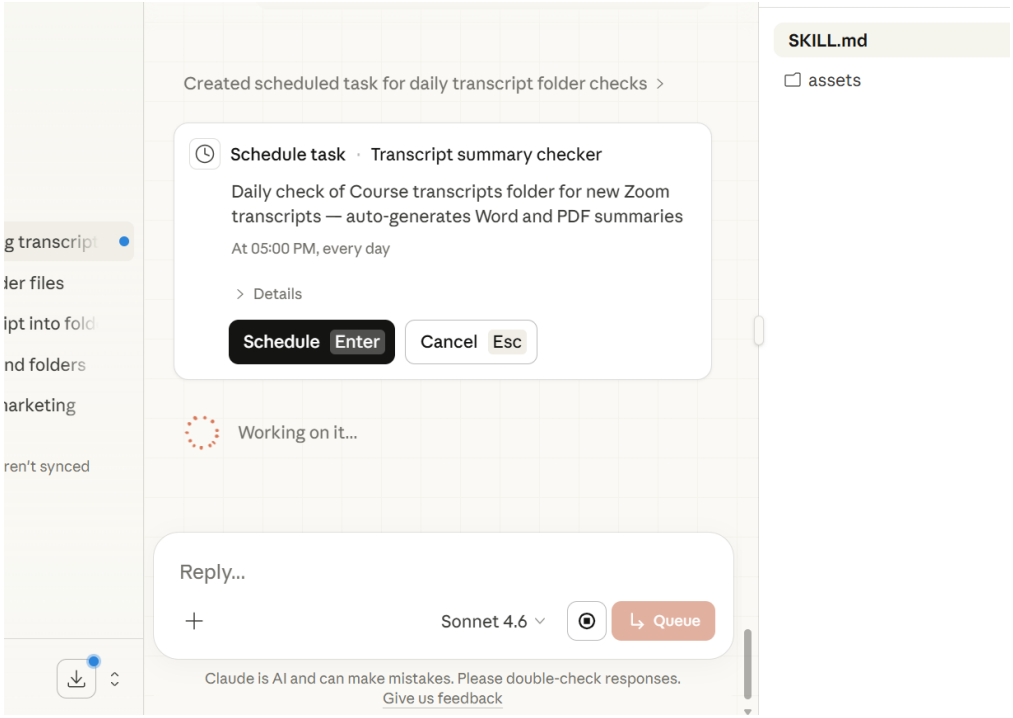
I can easily schedule this to be done every day at 5PM

I typed in this prompt

Please schedule for Cowork to check this folder every day 5PM. Disregard any files that it has previously analysed and summarised. If there is a new file, create a summary of the transcript using the same skills and create the subfolder with the word

It then started to create a skill that it will use in the future and it started to schedule

How To Get It To Create A Report / Document / Analysis file



It then asked me to confirm that I wanted this to be scheduled

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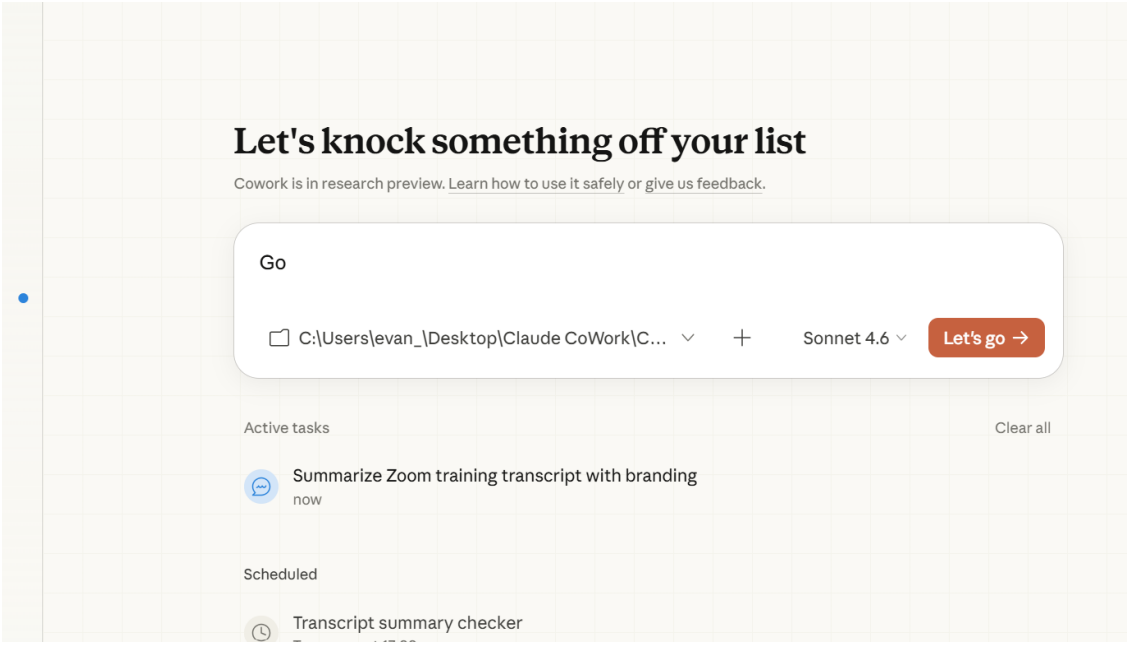


Another HUGE benefit

Whenever I want CoWork to check the folder and write those reports I simply

1. Select the folder
2. Type Go.

It will then check the folder and read the instructions I wrote earlier

What tasks could you ask CoWork to create?



Ask yourself ...

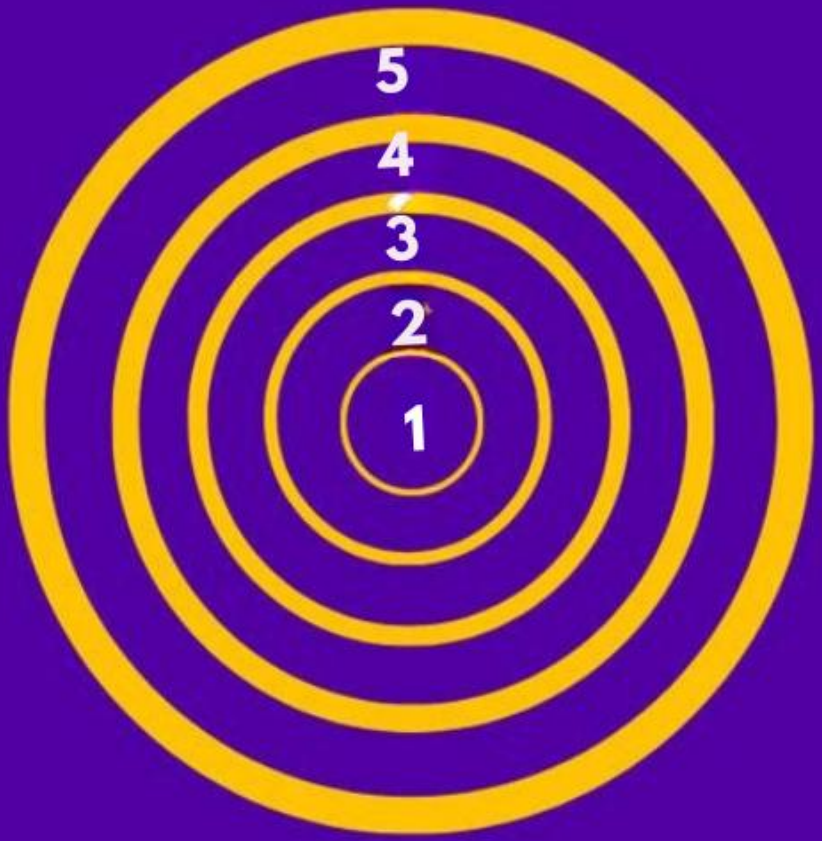
1. What do I do on my PC regularly that takes a lot of time.

2. Is it very similar each time so it could be repeatable in a skill

3. Does it involve text documents, spreadsheets, reports – if so it could be ideal for a Claude CoWork task

The MARKETING CROWD

USING AI FOR TASKS
CREATING FILES & DOING JOBS
Which Level Are You At?



5 Complex tasks on your PC & Web
CoWork connects to your Email, Calendar & external tools in order to complete multi step tasks on your PC

4 Basic Tasks On Your PC
Claude CoWork is working in a folder on your PC and you can schedule it to repeat simple tasks eg. file maintenance, generating weekly reports

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You write a prompt and the AI applies your custom skills (brand, writing style, business context) to complete the task.

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You have created skills (Brand. writing style, Business contcct) that AI can use when implementing repetitive tasks.

1 Identify tasks an AI can help you do
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