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THE CLAUDE Compendium

THE CONSULTING EDITION

An opinionated field guide to every Claude feature, how it maps to the market, and one hundred ways to put it to work.

COMPILED BY

SuRaM

Principal Consultant, Forcey

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Introduction

The Claude Compendium is a single-volume reference compiled in April 2026 on the state of Anthropic's Claude platform: its shipped features across all surfaces, its competitive positioning against the dominant incumbents, and one hundred concrete ways to put those features to work across consulting, general knowledge work, software development, creative practice, and daily life.

Compiled by SuRaM, Principal Consultant at Forcey, for internal use and external distribution. Views expressed are opinionated by design; disagree freely.

This document ages in dog years. Every statement about availability, pricing, and competitive posture reflects conditions at the moment of writing and will drift. Section V of this compendium describes a system for keeping a copy of this reference perpetually current; readers are encouraged to build one.

CONTACT SuRam@Forcey.in

LINKEDIN linkedin.com/in/sura69

WEB www.Forcey.in

Contents

I. The Lay of the Land

what you're actually buying into

Claude is no longer just a chatbot. In the last six months it has grown limbs — a design studio, an autonomous teammate, a coding agent that ships PRs, a browser operator, and a spreadsheet and slide native. The surface area is now wide enough that keeping a client current is itself a consulting deliverable.

> *Treat Claude as a platform, not a product. The billable insight isn't "use Claude" — it's knowing which surface fits which workflow, and which incumbent it credibly threatens this quarter.*

This compendium is organised in five parts. The Feature Catalog lists every shipped capability with platform availability. Vs. The Industry maps each feature to the incumbents it displaces, enhances, or respects. The 100 Use Cases are the imagination library, tagged by domain. The Daily Digest Playbook is the meta-layer: how to use Claude itself to stay ahead of Claude. A short appendix closes with further reading.

By the Numbers

40+ SHIPPED FEATURES	7 SURFACES / CLIENTS	100 USE CASES CATALOGUED
1M TOKEN CONTEXT (MAX)	Opus 4.7 FLAGSHIP MODEL	Apr '26 CLAUDE DESIGN DEBUT

Numbers shift weekly. Section V is how you keep them honest.

II. The Feature Catalog

every surface, every capability

What follows is the complete inventory of Claude features as of April 2026, organised by category. Each entry states what the feature does in two lines, where it runs, and a candid note on how it positions against the nearest incumbent.

Core Intelligence

Claude Opus 4.7

Flagship model. Strongest reasoning, vision, and long-running agent work. Powers the newest surfaces including Claude Design.

AVAILABILITY Web / Desktop / Mobile / API / CLI

> *Vs. GPT-5 / Gemini Ultra: edge in instruction-following, coding, and vision. Softer on raw creative image output.*

Projects

Persistent workspaces bundling custom instructions, files, and knowledge. Claude opens already knowing the context.

AVAILABILITY Web / Desktop / Mobile

> *Vs. ChatGPT Projects / Notion AI: deeper RAG, larger context, cleaner file ingestion.*

Memory

Cross-conversation memory of your name, style, preferences, ongoing work. Fully viewable and editable per entry.

AVAILABILITY Web / Desktop / Mobile

> *Vs. ChatGPT Memory: more granular user controls; free tier included since March 2026.*

Scoped Memory

Project-local memory that tracks evolving decisions within one workspace without polluting global context.

AVAILABILITY Web / Desktop

> *Vs. context dumping: replaces the ritual of re-pasting instructions into every new chat.*

Incognito Chat

One-off conversation that bypasses Memory and is not retained after the session closes.

AVAILABILITY Web / Desktop / Mobile

> *Vs. ChatGPT temporary chat: parity feature, useful for sensitive client work.*

1M Token Context

Million-token context window on Opus 4.6+ for Max/Team/Enterprise. ~750,000 words per conversation.

AVAILABILITY API / CLI (full); Web/Desktop (partial)

> *Vs. Gemini 2M: Gemini larger, Claude stronger retention (76% on MRCR v2 8-needle).*

Creation & Output

Artifacts

Side-panel canvas that renders HTML, React, SVG, Markdown, Mermaid as live, iterable previews.

AVAILABILITY Web / Desktop / Mobile

> *Vs. ChatGPT Canvas: wider rendering, React support, remixable public artifacts.*

Interactive Visualizations (Visualizer)

Inline diagrams, charts, mockups, interactive widgets streamed into chat without leaving the reply.

AVAILABILITY Web / Desktop / Mobile

> *Vs. static charts elsewhere: no equal at the time of writing.*

File Creation (Docs/Slides/Sheets/PDF)

Generates downloadable .docx, .pptx, .xlsx, and .pdf from conversation. Powered by curated skills.

AVAILABILITY Web / Desktop (full); Mobile/API (partial)

> *Vs. Office Copilot: no license tie-in; broader format range in one place.*

Code Execution (Sandbox)

Runs Python/bash in an isolated Linux container to compute, analyse data, test code, produce files.

AVAILABILITY Web / Desktop / API

> *Vs. ChatGPT Code Interpreter: broadly comparable; more transparent about file paths.*

Image Search (Inline)

Pulls relevant web images inline to illustrate answers — retrieved, not generated.

AVAILABILITY Web / Desktop / Mobile

> *Vs. Perplexity / Gemini: cleaner placement, tighter licensing awareness.*

Custom Styles

Saved writing voices (formal, concise, your own house style) switchable per conversation.

AVAILABILITY Web / Desktop

> *Vs. ChatGPT custom instructions: switchable per chat, not account-global.*

Research & Knowledge

Web Search

Real-time web queries with copyright-aware citations. Auto-triggers on present-day questions.

AVAILABILITY Web / Desktop / Mobile / API / CLI

> *Vs. Perplexity / Google AI Mode: stronger synthesis, stricter quote discipline.*

Research (Deep Research)

Agentic multi-step investigation across dozens of sources for questions needing a dossier, not an answer.

AVAILABILITY Web / Desktop; partial on Mobile/API

> *Vs. ChatGPT Deep Research / Gemini Deep Research: comparable depth; cleaner source attribution.*

Search Past Chats

Retrieves content from your own prior conversations and weaves it into new replies with permission.

AVAILABILITY Web / Desktop / Mobile

> *Vs. re-uploading documents: replaces the 'where did I say that' problem.*

Agents & Automation

Cowork

Autonomous agent mode that reads your files, creates documents, runs code, and executes multi-step tasks end-to-end.

AVAILABILITY Desktop (full); Mobile (partial)

> *Vs. ChatGPT Agent / Manus: file-system-first; works on your actual machine via Desktop.*

Cowork Projects

Cowork plus persistent memory, folders, and scheduled recurring tasks. The backbone of the Digest Playbook.

AVAILABILITY Desktop

> *Vs. Zapier / Make: richer reasoning per step, weaker integration breadth (for now).*

Skills

Reusable instruction packs that auto-activate by context. Encode brand voice, SOPs, formatting rules once.

AVAILABILITY Web / Desktop / Mobile / API / CLI

> *Vs. custom GPTs: compose together, trigger automatically, portable across surfaces.*

Skill Creator

Builds new Skills from your examples and preferences. Shortens a prompt-engineering afternoon to five minutes.

AVAILABILITY Web / Desktop / CLI

> *Vs. prompt engineering by hand: the democratising layer.*

MCP / Connectors

Model Context Protocol: standardised plugs into Gmail, Drive, Slack, GitHub, Asana, Figma, Gamma, Calendar.

AVAILABILITY Desktop (full); Web/Mobile (partial); API/CLI (full)

> *Vs. proprietary plugin stores: open protocol, portable between vendors.*

Desktop Extensions (.mcpb)

One-click installers for MCP servers. Replaces manual JSON config with a double-click.

AVAILABILITY Desktop only

> *Vs. raw MCP setup: turns a dev task into a consumer one.*

Developer Tools

Claude Code (CLI)

Terminal-native agentic coding. Hooks, Skills, headless mode, pipeable. The most capable surface.

AVAILABILITY CLI / API (full); Desktop (partial)

> *Vs. GitHub Copilot / Cursor: deeper autonomy, less IDE-bound.*

Claude Code (VS Code Extension)

Native IDE panel: inline diffs, @-mentions, plan-mode editing, multi-session tabs, sidebar.

AVAILABILITY Desktop (VS Code)

> *Vs. Copilot Chat / Cursor: plan editing and checkpoint/rewind are the differentiators.*

Claude Code (JetBrains)

Parity extension for IntelliJ, PyCharm, WebStorm, GoLand, Rider.

AVAILABILITY Desktop (JetBrains IDEs)

> *Vs. JetBrains AI Assistant: stronger agent loop, weaker IDE telemetry.*

Claude Code (Desktop)

GUI surface inside the Desktop app for non-terminal users: visual diffs, Cowork alongside, app preview.

AVAILABILITY Desktop

> *Vs. terminal CLI: friendlier, slightly heavier. Shared engine underneath.*

Claude Code (Web)

Browser-based coding agent on claude.ai/code. GitHub-only. Cloud-sandboxed. Pro+ subscribers.

AVAILABILITY Web; partial on Mobile

> *Vs. GitHub Codespaces: lighter, less configurable, fastest onramp.*

Claude Code (Slack / GitHub apps)

Async PR review, in-thread code questions, issue triage, CI integration.

AVAILABILITY Web / Mobile / API / CLI

> *Vs. CodeRabbit / Graphite AI: tighter context awareness.*

Developer Platform / API

Messages API with tool use, streaming, batching, structured output, prompt caching.

AVAILABILITY Web / API / CLI

> *Vs. OpenAI API / Vertex AI: competitive pricing, cleaner tool-use schema, prompt caching lead.*

Claude Code Security (Preview)

Enterprise preview that scans codebases for vulnerabilities by reasoning about data flows, not pattern-matching.

AVAILABILITY CLI (full); Desktop/API (partial)

> *Vs. Snyk / Semgrep: reasoning-based, not rule-based. Complementary more than competing.*

Office & Productivity

Claude for Excel

Add-in that reads full workbook context, applies Skills, and edits spreadsheets conversationally.

AVAILABILITY Desktop (Excel add-in)

> *Vs. Microsoft Copilot for Excel: better reasoning over messy sheets; requires the add-in.*

Claude for PowerPoint

Slide-deck agent inside PowerPoint. Generates, restructures, and polishes decks in-place.

AVAILABILITY Desktop (PowerPoint add-in)

> *Vs. Copilot for PowerPoint / Gamma: edits existing decks rather than replacing them.*

Gmail / Drive / Calendar MCP

First-party connectors for Google Workspace. Read mail, schedule, search and edit Drive files.

AVAILABILITY Desktop / API / CLI; partial on Web/Mobile

> *Vs. Gemini-in-Gmail: cross-vendor; works even if you're Workspace-light.*

Slack MCP

Read threads, post messages, summarise channels, draft replies. Consulting lifeblood.

AVAILABILITY Desktop / API / CLI

> *Vs. Slack AI: costs no extra seat; richer cross-tool reasoning.*

Design & Visual

Claude Design

New Anthropic Labs product (April 2026). Canvas-based design tool: wireframes, hi-fi mockups, prototypes, decks, one-pagers. Exports to Canva/PPTX/PDF/HTML and hands off to Claude Code.

AVAILABILITY Web only (for now)

> *Vs. Figma / Canva / v0 / Gamma: serious threat to quick-turn prototypes and decks. Figma's collaboration moat holds.*

Gamma Connector

Generate full presentations, documents, webpages, and social posts via the Gamma MCP.

AVAILABILITY Web / Desktop / API

> *Vs. native Gamma / Beautiful.ai: complementary — lets Claude drive Gamma as a renderer.*

Figma Connector

Read Figma frames, get design context, generate code from designs, write Code Connect mappings.

AVAILABILITY Web / Desktop / API / CLI

> *Vs. Figma's native AI: richer code generation; weaker in-canvas editing.*

Mobile

Claude iOS / Android

Full mobile client with chat, Projects, Artifacts, voice input, image capture, interactive app rendering.

AVAILABILITY Mobile

> *Vs. ChatGPT mobile: better long-context handling, weaker voice conversation UX.*

Cowork Agent Thread (Mobile)

Persistent agent thread on iOS/Android to monitor and assign Cowork tasks from anywhere.

AVAILABILITY Desktop / Mobile

> *Vs. desktop-only agents: makes agentic work genuinely ambient.*

Team & Enterprise

Role-Based Permissions

SCIM user groups with custom roles restricting Claude capabilities per department.

AVAILABILITY All surfaces (Team/Enterprise plans)

> *Vs. enterprise ChatGPT: parity with finer capability scoping.*

Shared Projects

Team workspaces with shared files, instructions, and evolving Artifacts.

AVAILABILITY Web / Desktop; partial on Mobile

> *Vs. Notion AI / shared GPTs: more focused on work product than knowledge base.*

Admin Controls & Audit

SSO, audit logs, usage policies, per-group spend limits, data retention configuration.

AVAILABILITY All surfaces

> *Vs. Enterprise OpenAI / Gemini: comparable; SOC 2 + ISO 27001.*

Claude in Chrome

Browser-agent extension. Tests web apps, reads console, fills forms, drives DOM. Pair with VS Code via @browser.

AVAILABILITY Web / Desktop (Chrome extension)

> *Vs. Perplexity Comet / Arc Max: deeper agentic loop, narrower browsing flourish.*

III. Vs. The Industry

who loses sleep, who shrugs

A frank assessment. 'Displaces' means the incumbent is at real risk for the stated job-to-be-done. 'Contested' means Claude competes credibly but the fight isn't over. 'Respects' means the moat still holds.

CLAUDE CAPABILITY	INCUMBENTS	WHAT ACTUALLY HAPPENS	VERDICT
Claude Design	Figma, Canva, Gamma, v0	Displaces for quick-turn prototypes, pitch decks, one-pagers, landing mockups. Exports to Canva natively. Claude Code handoff makes design-to-build one step.	*Displaces*
Claude Design	Adobe Creative Suite	Respects. Print, photo, video, and motion pipelines are untouched. Adobe's moat is craft depth, not speed.	*Respects*
Cowork + Cowork Projects	Zapier, Make, n8n	Partially displaces for reasoning-heavy workflows. Still loses on integration breadth and durability of long scheduled jobs.	*Contested*
Skills	Custom GPTs, Poe bots	Displaces for internal team use. Skills compose, auto-trigger, and travel across surfaces.	*Displaces*
Claude Code (all surfaces)	GitHub Copilot, Cursor, Windsurf	Competes head-on. Claude leads on agentic depth and plan editing; Cursor leads on IDE polish. Many teams run both.	*Displaces*
Claude for Excel / PowerPoint	Microsoft 365 Copilot	Enhances and competes. Same Office surface, different brain. Cheaper to A/B test than migrate.	*Displaces*
Memory + Scoped Memory	ChatGPT Memory, Notion AI context	Parity with lead in controls. Every entry viewable and editable; free-tier inclusion (March 2026) was a shot across the bow.	*Displaces*
Research (Deep Research)	Perplexity, ChatGPT Deep Research, Gemini	Competes. Claude's synthesis and citation hygiene are stronger; Perplexity's UX is tighter for one-off queries.	*Contested*
Claude in Chrome	Perplexity Comet, Arc Max, Opera Aria	Competes. Strong automation (fills forms, drives DOM). Weaker on ambient browsing delight.	*Contested*

CLAUDE CAPABILITY	INCUMBENTS	WHAT ACTUALLY HAPPENS	VERDICT
Artifacts + Visualizer	ChatGPT Canvas, Gemini Canvas	Displaces for devs and anyone shipping React / HTML. Broader runtime coverage.	*Displaces*
MCP / Desktop Extensions	Proprietary plugin stores (GPTs store, etc.)	Different philosophy. Open protocol; portable between vendors. Strategic win even if ecosystem is smaller today.	*Displaces*
File Creation (docx/pptx/xlsx/pdf)	Office Copilot, Google Workspace AI	Parity with portability lead. Not tied to a suite license. Matters for consultants juggling multiple clients.	*Displaces*
Claude Code Security (Preview)	Snyk, Semgrep, GitHub Advanced Security	Complements. Reasoning-based, not rules-based. Likely layered with incumbents, not replacing them.	*Respects*
Claude iOS / Android	ChatGPT, Gemini, Perplexity mobile	Competes. Stronger long-context reasoning, weaker voice conversation polish.	*Contested*

These verdicts are opinionated. The Displaces / Contested / Respects framing is designed to be argued with, not accepted. That is the point.

IV. One Hundred Ways

creative, practical, billable

What follows is not an exhaustive list — exhaustion is impossible at this point. It is an opinionated hundred, designed to spark your own compositions. The use cases are grouped into five domains. None of them requires a feature that does not exist; some of them have not been widely demonstrated yet. Those are the ones to pioneer.

Consulting

Twenty use cases built for client work, proposals, research, and billable deliverables.

No. 001 Instant competitive teardown

Feed a competitor's site and 10-K into a Project; Research agent produces a 12-page teardown with gaps, risks, and your client's angles.

Stack: Research · Projects · File Creation

No. 002 Client-voice ghostwriting Skill

Train a Skill on 30 of your client's past memos. Every new draft sounds like them, not like AI.

Stack: Skills · Styles

No. 003 RFP shred to shortlist

Drop a 60-page RFP into a Project; Claude extracts must-haves, nice-to-haves, evaluation criteria, and a gap matrix.

Stack: Projects · Research

No. 004 The daily Claude digest

Cowork Project + scheduled tasks + Artifacts + Gmail MCP. See Section V for the full playbook.

Stack: Cowork Projects · MCP · Artifacts

No. 005 Automated weekly status for three clients

Cowork reads Slack, Drive, and Linear. Drafts three branded PDFs every Friday. You edit the tone, not the content.

Stack: Cowork · MCP · File Creation

No. 006 Board-pack diagrams

Visualizer renders clean Mermaid flows, org charts, and strategy frameworks inline. Export SVG straight to the deck.

Stack: Visualizer · Artifacts

No. 007 Proposal pricing calculator

Claude Design generates an interactive HTML pricing configurator. Prospect plays with sliders; you see engagement.

Stack: Claude Design · Artifacts

No. 008 Market map one-pagers in under an hour

Claude Design + web capture of 15 competitor sites + your brand kit = a client-ready landscape map.

Stack: Claude Design · Web Search

No. 009 Interview coding at scale

Upload 40 transcript files into a Project; Claude codes themes, quotes, and sentiment into a grounded-theory spreadsheet.

Stack: Projects · File Creation

No. 010 Stakeholder summariser for long Slack threads

Slack MCP reads a 400-message thread; Claude produces a BLUF, decisions, owners, and next steps.

Stack: MCP · Slack

No. 011 Meeting-prep briefings the night before

Scheduled Cowork task pulls LinkedIn + news + CRM + past emails for tomorrow's attendees. Delivered at 21:00.

Stack: Cowork Projects · MCP

No. 012 Voice-of-customer synthesis

Merge Gong transcripts + NPS comments + support tickets. Skill-enforced output: top 7 themes, with verbatim quotes.

Stack: MCP · Skills

No. 013 Change-management comms kit

One prompt, three audiences: exec memo, all-hands deck, FAQ one-pager. Different Skills, same source material.

Stack: Skills · File Creation

No. 014 Expert-interview guide auto-generator

Feed Claude the hypothesis; it produces an interview guide, probes, and a coding rubric for post-call synthesis.

Stack: Projects · Skills

No. 015 Sanitised case study from real engagement

Claude redacts client names, normalises metrics, writes a compelling case study. Approval-ready draft.

Stack: Projects · Styles

No. 016 LinkedIn thought-leadership factory

Weekly task turns your five daily briefs into three post drafts, each in a different angle.

Stack: Cowork Projects · Styles

No. 017 RFP-to-draft-proposal

Past winning proposals + RFP + client research go in. A structured first draft comes out.

Stack: Projects · File Creation

No. 018 Diligence data-room speedrun

50-folder data room piped into a Project. Claude produces a diligence report flagging risks page-numbered to source.

Stack: Projects · Research

No. 019 Customised client onboarding portal

Claude Design builds a branded HTML welcome page per client with their docs, schedule, and Slack links.

Stack: Claude Design · MCP

No. 020 Assumption-challenger agent

A custom Skill that reads your strategy memo and returns the three strongest counter-arguments before any client send.

Stack: Skills

Work

Twenty use cases for the general knowledge worker — operations, comms, reviews, admin.

No. 021 Inbox triage that respects your taxonomy

Gmail MCP + Skill that knows your labels, urgency rules, and who actually needs a reply today.

Stack: MCP · Skills

No. 022 Calendar debt audit

Claude reviews your last 90 days of meetings, flags recurring low-value ones, drafts the cancel email.

Stack: MCP · Styles

No. 023 Policy-to-FAQ flip

Drop a 40-page HR policy doc in; Claude emits a searchable FAQ Artifact for the intranet.

Stack: Artifacts · File Creation

No. 024 Meeting notes that tag action items

Record with Granola or Fathom, feed transcript, Claude produces Markdown notes with owners and due dates.

Stack: Projects · Skills

No. 025 Weekly PRD summariser for PMs

Claude ingests every active PRD; produces a one-screen status matrix. Engineering leadership reads it in 90 seconds.

Stack: Cowork · File Creation

No. 026 Hiring rubric enforcer

Skill-encoded rubric + Claude reads candidate materials; outputs a calibrated scorecard with evidence quotes.

Stack: Skills · Projects

No. 027 Customer-call coach

Upload a recorded call; Claude grades it against your playbook and writes a personalised improvement plan.

Stack: Projects · Styles

No. 028 Auto-generated release notes

GitHub MCP reads merged PRs; Claude writes user-facing release notes in your marketing voice.

Stack: MCP · Skills

No. 029 Internal wiki janitor

Scheduled Cowork run finds stale pages, proposes edits, files PRs against your docs repo.

Stack: Cowork Projects · MCP

No. 030 Travel-logistics concierge

Calendar MCP + email parsing + weather. Claude builds a day-by-day card Artifact for your next trip.

Stack: MCP · Artifacts

No. 031 OKR drafting workshop-in-a-box

Claude Design mocks up the workshop deck; a Skill enforces OKR quality rules; output is a facilitation guide.

Stack: Claude Design · Skills

No. 032 Quarterly review ghostwriter

Fed your calendar, emails sent, and wins channel, Claude drafts your self-review and your reports' reviews.

Stack: MCP · Styles

No. 033 Stakeholder update that writes itself

Project holds your plan; Cowork summarises progress against it each Friday. Email draft in your voice, ready to send.

Stack: Cowork Projects · Styles

No. 034 Talk-track from a messy doc

Paste the half-written memo; Claude returns a 5-minute spoken talk track and the slides Artifact to go with it.

Stack: Artifacts · Styles

No. 035 Procurement-doc plain-language layer

Vendor contract in, redlined plain-English summary out, risks flagged in a table.

Stack: File Creation · Projects

No. 036 Onboarding buddy for new hires

Project holds company docs; new hire asks questions in-Slack; Claude replies with cites to the canonical source.

Stack: Projects · MCP

No. 037 Vendor-comparison Artifact

Interactive HTML table with weighted scoring sliders the committee can play with live.

Stack: Artifacts · Claude Design

No. 038 Email-response time saver

Custom Style + Memory of your tics (no 'just', yes em dashes). Drafts that don't need the usual rewrite.

Stack: Styles · Memory

No. 039 Compliance-ready meeting minutes

Skill enforces the minutes format; Claude reads transcript; output is board-ready within 20 minutes of meeting end.

Stack: Skills · File Creation

No. 040 Annual report figure-caption writer

Feed the charts and data; Claude writes the analytic captions a good financial writer would. Consistent across 80 figures.

Stack: Projects · Styles

Developer

Twenty use cases for engineers, from greenfield builds to legacy archaeology.

No. 041 Greenfield microservice in an afternoon

Claude Code CLI scaffolds, writes tests, runs them, commits. You review, not type.

Stack: Claude Code CLI

No. 042 Legacy codebase archaeology

1M context reads a 200k-line monorepo; Claude produces a living architecture diagram Artifact.

Stack: 1M Context · Visualizer

No. 043 PR review bot with your team's rules

Skill encodes your lint-plus-judgment style. GitHub app comments on every PR in the same voice as your best senior.

Stack: Skills · Claude Code

No. 044 Flaky-test hunter

Scheduled Cowork run analyses CI history, clusters flake patterns, files issues with reproductions.

Stack: Cowork · Claude Code

No. 045 Design-to-code with real fidelity

Claude Design or Figma MCP → Claude Code produces the React components. Tokens preserved. Types correct.

Stack: Claude Design · Claude Code

No. 046 Security reasoning over diffs

Claude Code Security preview reasons about data flows across a PR, not just patterns.

Stack: Claude Code Security

No. 047 Stack migration plan that respects reality

Upload repo; Claude produces a phased migration plan with effort estimates and rollback points.

Stack: Projects · 1M Context

No. 048 Interactive runbook for on-call

Claude builds an HTML Artifact with a decision tree, live-pasted log analysis, and escalation contacts.

Stack: Artifacts · Claude Design

No. 049 Browser-test suite from a bug report

Claude in Chrome reproduces the bug, writes the Playwright script, commits via Claude Code.

Stack: Chrome · Claude Code

No. 050 Natural-language SQL playground

MCP to the DB + Artifact of a query builder. Safer than letting stakeholders write SQL; faster than a BI ticket.

Stack: MCP · Artifacts

No. 051 Doc-site auto-generated from code

Cowork reads the repo on merge, updates the docs site, opens a PR for the team to review.

Stack: Cowork · Claude Code

No. 052 Dependency-upgrade pilot

Skill that handles a specific dep upgrade pattern. Runs across 40 repos in a night.

Stack: Skills · Claude Code CLI

No. 053 Test-coverage gap report with priorities

Claude reads coverage + git blame + issue tracker. Output: what to test next, ordered by risk.

Stack: Projects · Research

No. 054 Refactor PRs with rollback guarantees

Plan-mode editing lets you sculpt the change before Claude touches the files. Undo by branch.

Stack: Claude Code VS Code

No. 055 Observability dashboard from zero

Claude Code scaffolds the Grafana / Datadog config; Claude Design mocks the dashboard first.

Stack: Claude Design · Claude Code

No. 056 Spec-to-tests

Skill reads the PRD, emits a full integration test suite in your framework.

Stack: Skills · Claude Code

No. 057 Code-quality monthly digest for EMs

Cowork synthesises CI, review latency, bug-fix ratio into a two-page PDF.

Stack: Cowork · File Creation

No. 058 SDK sample generator in five languages

One canonical recipe, emitted idiomatically in Python, TS, Go, Java, and Ruby. Consistent.

Stack: Skills · Claude Code

No. 059 Incident postmortem structurer

Messy chat log + metrics screenshots in; blameless postmortem doc out, with contributing factors table.

Stack: File Creation · Skills

No. 060 Local-dev setup fixer

Claude Code diagnoses and fixes broken node_modules, venv, or pyenv situations by reading your logs.

Stack: Claude Code CLI

Creative

Twenty use cases for writers, designers, and makers.

No. 061 Brand voice that survives six writers

Style + Skill + brand lexicon. Every freelancer's draft converges on the same voice.

Stack: Styles · Skills

No. 062 Newsletter that writes the rough draft

Research + your taste-log + past issues. Claude hands you 80%; the last 20% is where your voice lives.

Stack: Research · Styles

No. 063 Pitch deck from a napkin sketch

Upload sketch photo to Claude Design; polished hi-fi deck returns. Skip the intern phase.

Stack: Claude Design

No. 064 Interactive case study

Artifact with scrollytelling and live-data charts. Client reads it; they remember it.

Stack: Artifacts · Visualizer

No. 065 YouTube script that respects retention

Viral-video-scriptwriter Skill enforces hook, retention loops, pattern interrupts. You just pick the topic.

Stack: Skills · Research

No. 066 Book-club study guide per chapter

Project holds the book; Claude emits discussion questions, themes, and counterpoints — chapter by chapter.

Stack: Projects · File Creation

No. 067 Long-form article distilled to threads

One 4k-word piece becomes five LinkedIn posts, three X threads, a newsletter blurb, a podcast cold-open.

Stack: Styles · Skills

No. 068 Photo-book layout assistant

Claude Design lays out 200 photos into a 60-page book grid with captions drafted from EXIF and your notes.

Stack: Claude Design

No. 069 Client brand-book one-pager

Feed the messy brand docs; get a single HTML page with type, colour, voice, do/don't. Publish via Artifacts.

Stack: Claude Design · Artifacts

No. 070 Podcast show-notes factory

Transcript in; show notes, chapter markers, pull quotes, three tweet options, and a guest thank-you email out.

Stack: Skills · File Creation

No. 071 AI-assisted comic panel scripting

You write the idea; Claude structures pacing, panel-by-panel dialogue, and pencil briefs for the artist.

Stack: Styles · Projects

No. 072 Album-art moodboard assembled from the web

Web Search + image search + Claude Design laying it into a three-panel Artifact.

Stack: Web Search · Claude Design

No. 073 Speech coach in your pocket

Record yourself; Claude iOS transcribes, evaluates pacing and filler words, returns a tighter draft.

Stack: iOS App · Styles

No. 074 Song-lyric metaphor doctor

Claude refuses to reproduce copyrighted lyrics but will write five fresh metaphors in the same emotional key.

Stack: Styles

No. 075 Design-system starter kit

Claude Design's Design System feature bootstraps tokens; Claude Code wires them into a component library.

Stack: Claude Design · Claude Code

No. 076 Book-cover mock variations

Six cover mocks in six different aesthetic directions. Good enough to run an Instagram poll.

Stack: Claude Design

No. 077 Comic-style explainer

Educational concept + Visualizer rendering + panel narration. Works for kids and executives alike.

Stack: Visualizer · Skills

No. 078 Voice memos to travel blog

Record audio on phone, Claude transcribes and stitches into a Substack post in your voice, image prompts included.

Stack: iOS App · Styles

No. 079 Zine layout in a Saturday afternoon

Claude Design's fluid card dimensions + your scanned art = a print-ready zine PDF.

Stack: Claude Design · File Creation

No. 080 Course module storyboarded

Course-creator Skill turns a lecture topic into a narrated slide deck, quiz, and transcript, ready for LMS.

Stack: Skills · File Creation

Life

Twenty use cases for the non-billable hours — home, family, health, identity.

No. 081 Meal plan that remembers your family

Memory holds allergies, dislikes, budget. Weekly plan + grocery list + recipe cards, all consistent.

Stack: Memory · File Creation

No. 082 Home-renovation brief that contractors respect

Photos of your space + inspiration photos + budget. Output: a structured brief with scope and risk flags.

Stack: Projects · File Creation

No. 083 Personal-finance statement reader

Upload bank PDF; Claude categorises, flags anomalies, projects next month. No spreadsheet required.

Stack: Projects · Code Execution

No. 084 Doctor-visit prep sheet

Your symptoms, timeline, current meds → a structured one-pager to hand to the specialist. Saves real minutes in the room.

Stack: File Creation · Memory

No. 085 Letter to a younger relative

You give Claude the values and stories; it drafts; you make it yours. Keeps it from sounding preachy.

Stack: Styles

No. 086 Travel itinerary the family will actually follow

Places search + map display + your pace (slow mornings, no museums after 15:00).

Stack: Places Search · Memory

No. 087 Language-partner with taste

Pocket-mentor Skill drills grammar via conversation topics you actually care about.

Stack: Skills · Memory

No. 088 Personal daily journal with patterns

Voice memos in; monthly pattern-spotting Artifact out. Subtle wins, subtle drifts.

Stack: Artifacts · Memory

No. 089 Moving-house command centre

Project holds leases, utility accounts, checklist. Calendar MCP schedules the turn-offs and turn-ons.

Stack: Projects · MCP

No. 090 Child-homework Socratic tutor

Explicitly instructed not to give answers. Asks questions, scaffolds thinking. Parents get a summary.

Stack: Skills · Memory

No. 091 Reading-list curator

Past books you loved → five recommendations with the specific reason each matches your taste.

Stack: Memory · Web Search

No. 092 Fitness program adapter

Existing program + today's soreness, sleep, mood = today's modified session. Not a generic plan.

Stack: Memory · Skills

No. 093 Wedding-logistics artifact

Interactive HTML page for the wedding party with schedule, vendor contacts, FAQ, dress-code photos.

Stack: Artifacts · Claude Design

No. 094 Pet-care rotation schedule

Cowork builds the schedule, emails the dog-sitter, adds events to your partner's calendar.

Stack: Cowork · MCP

No. 095 Home-inventory for insurance

Walk through with phone camera; Claude catalogues items, estimates values, generates claim-ready PDF.

Stack: iOS App · File Creation

No. 096 Recipe scaled, substituted, re-written

Recipe widget with base servings; substitute two ingredients you don't have without ruining it.

Stack: Recipe Widget · Memory

No. 097 Car-shopping researcher

Your constraints in; spec-matched shortlist with dealer-negotiation notes and last-week price trends.

Stack: Research · Memory

No. 098 Difficult-conversation rehearsal

Role-play a tough chat (performance review, breakup, parenting). Claude plays the other side, then debriefs.

Stack: Styles · Skills

No. 099 Family photo-album captioner

Upload a folder; Claude writes warm, contextual captions (with names via Memory, not via face-ID).

Stack: Memory · File Creation

No. 100 Annual 'state of me' review

One day a year, Claude ingests your calendar, journal, and wins-log. Outputs an honest, caring year-in-review.

Stack: Research · Memory

V. The Digest Playbook

use Claude to stay ahead of Claude

The fastest way to stay current on Claude is to put Claude to work on it. What follows is a four-layer system — a daily artifact you will actually open, powered by the same tools you are tracking. The system is fully meta: it uses Cowork Projects, Skills, MCP, Artifacts, and file creation — precisely the features this compendium catalogues.

Layer 01 · Collection

A Cowork Project that wakes up before you do

In the Claude Desktop app, create a Cowork Project named Claude Daily Brief. Drop in the four canonical source URLs below as context files. Cowork Projects support scheduled recurring tasks — set one for 06:30 local time.

> Every weekday at 06:30: 1. Fetch the Anthropic News, Release Notes, and Claude Code changelog pages. 2. Web-search "Claude" from the last 24h, filtering X / Reddit / LinkedIn / Hacker News. 3. Deduplicate. Cluster by theme. 4. Write a 400-word brief with: - What shipped (official) - What's being built with it (community) - What press is saying (analysts) - One "consulting angle" per item. 5. Save to this Project as today's date.

The four source categories

- Official: anthropic.com/news, anthropic.com/engineering
- Changelog: code.claude.com/docs/en/changelog and claude.com/release-notes
- Community: r/ClaudeAI, a curated X/Twitter list, LinkedIn #Claude posts, Hacker News
- Press: TechCrunch, The Information, VentureBeat, The Verge

Layer 02 · Curation

A Skill that enforces your editorial voice

Raw research is not a digest. Build a custom Skill called Consulting Digest Format that defines your house style: BLUF at top, a 'so what for the client' paragraph, one crisp recommendation, no hype language. The Skill auto-activates whenever the Cowork task runs.

> Skill rules: - Max 400 words, scannable in 90 seconds - Banned words: "revolutionary", "game-changer", "disrupting", "AI-powered" - Every item ends with: "Billable angle: ..." - Flag breaking changes with [BREAKING] - Flag preview/research features with [PREVIEW]

Layer 03 · Presentation

An Artifact that renders the brief

Ask Claude to produce the brief as an HTML Artifact — a newspaper-style single page, dated, with anchor links and a 'forward this to a client' button that copies a cleaner plaintext version. Pin the Artifact to your Project. Each day's Artifact is a permanent, searchable record.

> Output contract: - Standalone HTML Artifact (one file) - Three sections: Shipped / Built / Said - Footer: next three things to watch - Copy-as-plaintext control - Dark serif headline, mono metadata

Layer 04 · Distribution

MCP connectors that close the loop

Connect Gmail and Slack via MCP. Extend the scheduled task to email the Artifact to yourself and post a three-bullet TL;DR to a private Slack channel. For consulting, add a second task that runs weekly on Fridays to synthesise the five daily briefs into a client-ready PDF via Claude's file creation.

> Weekly Friday 16:00 task: 1. Read all 5 daily briefs from this week. 2. Synthesise into: Themes / Movers / Risks. 3. Produce a branded PDF (docx skill). 4. Draft 3 LinkedIn post options. 5. Email to me with subject "Weekly Claude Brief — week of {date}"

Why This Works for Consulting

You end up with a dated, searchable archive of every Claude shift — proof-of-currency for RFPs, raw material for thought-leadership posts, and a gift you can send to clients without breaking your morning. The entire system is meta: it uses the exact tools it is tracking, which means the Digest Playbook itself gets better every time Claude ships. When Cowork Projects gains a new primitive, so does your system — for free.

> *The highest-leverage use of a new tool is to aim it at the problem of keeping up with the new tool.*

PART. II · NO. 001 · v1.0

THE CONSULTANT'S Twenty

WORKING PROMPTS · FIELD-TESTED · COPY-PASTE READY

VI. The Top Twenty

Top 20 Prompts

The working companion to The Claude Compendium — twenty complete prompts for the consulting use cases in Part I, each with setup, expected output, variations, and the gotchas nobody tells you about.

No. 01 Instant Competitive Teardown

A 12-page teardown of a competitor's posture in under an hour, grounded in their own public materials.

SETUP

- Create a Claude Project titled 'Teardown — [Competitor Name]'.
- Upload the competitor's latest annual report (10-K, 20-F, or equivalent) as a PDF.
- Upload a fresh HTML or PDF capture of their homepage, pricing page, and investor relations page.
- If available, upload their latest earnings call transcript (Seeking Alpha has them for free).
- Enable Web Search in the Project settings so Claude can fetch recent news.
- Have ready: a one-paragraph description of YOUR CLIENT and what they want to know.

THE PROMPT

```
You are a senior strategy consultant preparing a competitive teardown of [COMPETITOR NAME] for my client, [CLIENT NAME AND ONE-LINE DESCRIPTION].

Use ONLY the materials in this Project plus web search for news from the last 90 days. Do not hallucinate figures — if a number is not in the source material, say so explicitly and note what would be needed to find it.

Produce a structured teardown with the following sections. Each section should be 200-400 words, cite specific pages or URLs for every claim, and end with a "so what for [CLIENT NAME]" paragraph.

1. STRATEGIC POSTURE — What game are they playing? Positioning, chosen segments, explicit and implicit "no's".
2. REVENUE ENGINE — How they actually make money. Business model, unit economics where disclosed, recent shifts.
3. PRODUCT & GTM — What they sell, to whom, through what channels. Recent launches or pivots.
4. ORGANISATIONAL SIGNALS — Hiring patterns, leadership changes, investment areas inferred from job postings and press.
5. FINANCIAL HEALTH — Growth, margin trajectory, cash position, capital structure. Flag anomalies.
6. VULNERABILITIES — Where are they stretched, exposed, or making bets that might not pay off?
7. TWO-YEAR OUTLOOK — Where are they likely to be by [CURRENT YEAR + 2]? Signal the confidence level.
8. ANGLES FOR [CLIENT NAME] — Three concrete moves my client should consider in response.

End with a one-page "Executive Read" that distills the whole teardown into exactly 250 words for a CEO who has 90 seconds.
```

EXPECTED OUTPUT

A ~12-page analytical document with full source citations, ready for a senior partner review. Typically 60-90 seconds of generation time. You will edit roughly 20% of it — primarily to sharpen the 'angles for client' section, which Claude handles well but rarely spectacularly.

VARIATIONS

- Instead of a client, substitute: 'for my firm's internal investment committee, who are considering whether to short this stock.'

- Narrow the scope: 'Focus only on the GTM section — I need 2,000 words of detail on their sales motion, channel strategy, and recent RFP wins.'
- Add a comparison layer: 'After the teardown, produce a side-by-side positioning matrix comparing them to [COMPETITOR 2] and [COMPETITOR 3].'

GOTCHAS

- Do not skip the 'cite or say you don't know' instruction. Without it, Claude will occasionally invent plausible-sounding financial figures.
- If the 10-K is over 300 pages, it will consume significant context. Consider uploading only the MD&A and risk factors sections for a first pass.
- The 'angles for client' section is only as good as your client description. Spend a real minute on that paragraph; vague input produces vague output.

No. 02 Client-Voice Ghostwriting Skill

Every draft you produce for a client sounds like them, not like AI.

SETUP

- Collect 20-30 pieces of writing that are genuinely by your client (or the person whose voice you're emulating): memos, emails, LinkedIn posts, blog posts, book chapters — whatever is authentically theirs.
- Paste them into a single text document called 'voice-samples.txt'. Add a one-line header above each sample: date, audience, purpose.
- Have a Claude Pro+ subscription for Skill creation, or access to the Skill Creator feature.
- Clear 20 minutes — this is a build, not a quick prompt.

THE PROMPT

```
I am building a custom Skill for writing in the voice of [PERSON'S NAME AND ROLE]. I will paste 20-30 samples of their authentic writing below. Your job is to analyse the samples and produce a complete Skill specification.

Analyse the samples for:
• Sentence length distribution (average, variance, signature patterns)
• Vocabulary tics — words they use often, words they almost never use, unusual word choices
• Rhetorical devices they favour (rule-of-three, em-dash asides, rhetorical questions, short declarative finishes)
• Structural habits — how they open, how they close, how they transition
• Humour register — dry, absent, self-deprecating, sharp
• Technical-to-plain-English ratio — do they define jargon, or assume it?
• Tense and voice preferences
• Any distinctive punctuation habits
• What they avoid — corporate clichés they never use

Then produce the Skill specification in this exact format:

SKILL NAME: [voice of PERSON'S NAME]
TRIGGER: [when Claude should activate this Skill]
RULES: [10-15 specific, testable writing rules]
BANNED WORDS: [words this person never uses]
SIGNATURE PATTERNS: [3-5 rhetorical moves to emulate]
SAMPLE OPENINGS: [3 sentence-starts that match their voice]
SAMPLE CLOSINGS: [3 sentence-finishes that match their voice]

After the spec, write a 200-word sample paragraph in their voice on a topic of your choice — not a topic from the samples — so I can sanity-check the calibration before I save the Skill.

Here are the samples:

[PASTE 20-30 SAMPLES HERE, EACH PRECEDED BY A HEADER LINE]
```

EXPECTED OUTPUT

A structured Skill spec you can paste directly into Claude's Skill Creator, plus a test paragraph that lets you validate the voice match before going live. Expect to iterate two or three times on the rules — Claude tends to over-index on the first few samples.

VARIATIONS

- For brand voice (company, not person): 'Analyse the samples and produce a brand voice Skill for [COMPANY]. Focus on consistency across multiple writers rather than emulating one individual.'
- For register-matching within one person: 'This person writes differently for investors vs customers. Produce TWO Skills: [name]-investor-voice and [name]-customer-voice.'
- For the harder case — you only have 5 samples: 'Be explicit about which conclusions you can draw with confidence (bold claims) vs which are weak signals (grey claims). Tell me what additional samples would tighten the calibration.'

GOTCHAS

- Do not include writing that was ghostwritten or heavily edited. Garbage in, garbage out — the Skill will learn the ghostwriter's voice, not the principal's.
- Skills degrade when over-applied. If the voice is very specific, Claude sometimes parodies it. Ask for a calibration paragraph early and dial the rules back if they feel too heavy-handed.
- For LinkedIn voice specifically: LinkedIn voice is its own performance. Don't assume a LinkedIn-trained voice will work in a board memo.

No. 03 RFP Shred to Shortlist

Turn a 60-page RFP into a go/no-go decision and a gap matrix in 15 minutes.

SETUP

- Create a Claude Project titled 'RFP — [Client Name] — [Date Due]'.
- Upload the full RFP document (PDF or DOCX).
- Upload any appendices, addenda, and Q&A documents issued by the client.
- Upload your firm's current capability deck or a one-pager on your service offering.
- Have ready: your firm's rough fully-loaded day rate, available capacity window, and any known disqualifiers (conflicts, geographic restrictions, etc.).

THE PROMPT

```
I need a senior-level shred of this RFP before we decide whether to bid. Act as a bid strategist.

Produce the following, in this exact order:

1. ONE-PAGE SUMMARY
  • What the client is actually buying (not what they say they're buying)
  • Budget signal — explicit or inferred, with the basis for inference
  • Timeline — proposal due, work starts, work ends
  • Decision-maker and decision criteria, if stated
  • Anything that smells like a pre-wired bid (incumbent favouritism, overly specific requirements)

2. MUST-HAVE / NICE-TO-HAVE TABLE
  • Parse every explicit requirement
  • Tag each as MUST (disqualifier if missing), SHOULD (strong scoring), NICE (bonus points)
  • For each, one line on whether my firm has it, based on the capability deck I uploaded

3. GAP MATRIX
  • Requirements where we have clear strength → leverage points
  • Requirements where we are adequate → neutral
  • Requirements where we are weak or missing → risk/mitigation notes
  • Requirements that seem designed to exclude firms of our profile — FLAG EXPLICITLY

4. EVALUATION CRITERIA ANALYSIS
  • How is this being scored? Extract the weightings if given.
  • What do high-scoring bids in this kind of RFP typically emphasise?
  • What differentiator, if we have it, would unlock 10+ points?

5. GO / NO-GO RECOMMENDATION
  • Clear recommendation with reasoning
  • Three scenarios under which the recommendation flips
  • Estimated hours to produce a competitive bid

6. RED FLAGS
  • Ambiguous terms that could trap us
```

> • Contradictions between sections
> • Missing information we need to request before bidding
>
> Be blunt. If this looks wired for the incumbent, say so. If the client's budget can't support what they're asking for, say so with evidence.

EXPECTED OUTPUT

A structured bid-evaluation memo that a managing partner can read in 10 minutes and approve a go/no-go call on. Typically 3-5 pages depending on RFP complexity. The gap matrix is usually the most immediately useful artifact; clip it into your capture plan directly.

VARIATIONS

- Pre-existing incumbent check: 'Additionally, do a 10-minute web search on whether [CLIENT] has issued similar RFPs in the past 24 months and who won. Comment on incumbent advantage.'
- Written response mode: 'After the shred, produce a first draft of the win themes we should build the proposal around. 3-5 themes, each with a one-sentence positioning statement.'
- Multiple bidders view: 'Also speculate — based on the RFP's language and requirements — on the three most likely other bidders and what each of their strongest pitches would sound like.'

GOTCHAS

- If the RFP is government-procurement, Claude will be conservative about scoring language. That's correct behaviour — government RFPs often have legally binding evaluation criteria.
- The 'pre-wired' detection is useful but imperfect. Use it as a prompt to investigate, not as a conclusion.
- Your capability deck probably overstates your capabilities. Claude will take it at face value. Mentally discount by 15-20% when reading the gap matrix.

No. 04 The Daily Claude Digest

A consulting-grade brief on Claude's ecosystem, waiting for you at 06:30 every weekday.

SETUP

- You need a Claude Pro, Max, Team, or Enterprise subscription (Routines are not on Free).
- Enable Web Search at the account level.
- Decide your delivery channel: Gmail is easiest via MCP; Slack works if you have Slack MCP configured.
- Option A (recommended): Claude Routines — runs in the cloud, works when your laptop is closed. Pro gets 5 runs/day; this counts as one.
- Option B (fallback): Cowork Project with a scheduled task — runs on your Desktop app when it's open. Use this if Routines aren't in your plan.
- Have ready: a list of your canonical sources (see prompt below for defaults).

THE PROMPT

```
Create a saved Claude Routine called "Claude Daily Brief" with the following specification.

TRIGGER: Schedule. Run at 06:30 local time, every weekday.

TASK:
You are compiling my daily brief on the Claude / Anthropic ecosystem. I am a strategy consultant who uses Claude with clients. I need to know what shipped, what the community is building with it, and what the press is saying.

Step 1 — OFFICIAL
Fetch these URLs. Read anything published in the last 24 hours.
• https://www.anthropic.com/news
• https://www.anthropic.com/engineering
• https://claude.com/release-notes
• https://code.claude.com/docs/en/changelog

Step 2 — COMMUNITY
Web-search "Claude" and "Anthropic" filtered to the last 24 hours. Prioritise:
• r/ClaudeAI posts with 50+ upvotes
• X/Twitter posts from @AnthropicAI, @alexalbert__, @sama (for competitive context), @karpathy, plus anyone building with Claude at scale
• LinkedIn posts tagged #Claude or #Anthropic with meaningful engagement
• Hacker News threads mentioning Claude with 100+ points

Step 3 — PRESS
Search Google News for "Anthropic" and "Claude" in the last 24 hours. Sources to weight highly: TechCrunch, The Information, VentureBeat, The Verge, Wired, Stratechery, Ben Thompson.

Step 4 — SYNTHESISE
Produce a brief of exactly 400 words in this structure:

## WHAT SHIPPED
```

```
[Up to 3 bullets from official sources. Each bullet: one sentence of fact, one sentence of "so what for consulting".]

## WHAT'S BEING BUILT
[Up to 3 bullets from community. Each bullet: the workflow/hack, the person or team, a link. Focus on things you can learn from, not just hype.]

## WHAT THEY'RE SAYING
[Up to 3 bullets from press. Each bullet: the framing, the author/outlet, whether I should read the full piece (yes/skim/skip).]

## BILLABLE ANGLE
[2-3 sentences. What one of today's items means for my client conversations this week. Be specific, not generic.]

## NEXT THREE THINGS TO WATCH
[Exactly 3 bullets. What's rumoured, what's teased, what's due. Each with a source link or "unconfirmed".]

BANNED WORDS: revolutionary, game-changer, disrupting, AI-powered, unprecedented. If an item only merits hype language, cut it.
FLAG WITH [BREAKING] any item that changes an existing product or pricing.
FLAG WITH [PREVIEW] any item that is a research preview.

DELIVERY:
Email this brief to [YOUR EMAIL] with the subject "Claude Brief — [DATE]".
Also post the brief to Slack channel #claude-brief (private, only me) as a threaded message.
Save a copy to the Project 'Claude Daily Brief' as a Markdown artifact, filename YYYY-MM-DD.md.
```

EXPECTED OUTPUT

At 06:30 each weekday you'll have a 400-word brief in your inbox, a Slack copy for mobile glance, and a dated Markdown archive you can search across months. The 'Billable Angle' section becomes raw material for LinkedIn posts and client emails. The 'Next Three Things' section is surprisingly good at predicting what matters.

VARIATIONS

- Weekly synthesis (add as a second Routine): 'Every Friday at 16:00, read this week's 5 daily briefs. Produce a PDF-ready summary: Themes / Movers / Risks. Email to me.'
- Monthly trend report: 'On the last working day of each month, synthesise the month's briefs into a 2-page trend report formatted for a client update. Generate as DOCX.'
- Competitive overlay: 'Also track OpenAI, Google DeepMind, and Mistral using the same structure. Produce a cross-vendor section at the bottom.'

GOTCHAS

- Routines count against your usage quota. Running the full daily + weekly + monthly set uses roughly 3-4 routine-runs per week on a Pro plan. Max users don't feel it.
- The 'community' section drifts toward noise over time. Audit your X/Twitter source list every 60 days — people who were signal 3 months ago may be chasing thought-leader clout now.
- If you miss a weekday (holiday, travel), don't rerun — the 24-hour search window means the next day's brief will naturally catch the gap. Rerunning produces a bloated, duplicated brief.

- Routines is in research preview. Expect occasional misses, especially around major Anthropic launch days when their own servers are busy. Keep the Cowork fallback configured.

No. 05 Automated Weekly Status for Three Clients

Every Friday, three branded PDFs land in your drafts. You edit tone, not content.

SETUP

- Connect MCP servers for: Slack (for the client's channel or your internal channel), Google Drive or OneDrive (for shared folders), and whatever project management tool the client uses (Linear, Asana, Notion, Jira).
- Create a separate Claude Project per client. Name them consistently: 'Status — [Client Name]'.
- Upload each client's brand kit (logo, colours, fonts) and last three status reports as reference.
- Set up a Cowork Project (for consistency across three clients, Cowork Projects works better than Routines here because you want to review before sending).
- Create a scheduled task for every Friday at 15:00.

THE PROMPT

```
You are my weekly status report assistant. Every Friday at 15:00, produce three client status reports — one per Client Project — to drafts (do NOT send).

FOR EACH CLIENT:

Step 1 — GATHER
• Read all messages posted in the client's Slack channel this week
• List all files created or modified in the shared Drive folder this week
• Pull all issues/tickets closed, opened, or status-changed in their PM tool this week
• Identify meetings held with this client this week (from my calendar)

Step 2 — SYNTHESISE
Produce a status report using this EXACT structure. Use the client's brand colours for headings where possible (refer to the brand kit in this Project).

HEADER: Week of [DATE RANGE] — [Client Name] Status

1. HEADLINE (one sentence: the one thing they need to know this week)
2. PROGRESS — What we completed. Specific, with evidence. No "worked on" verbs — use "delivered", "shipped", "resolved".
3. IN FLIGHT — What's actively in progress. Each item with current status and expected completion.
4. NEW THIS WEEK — What started that wasn't on last week's plan, and why.
5. BLOCKERS & DECISIONS NEEDED — Short, numbered, with a clear "we need you to [action] by [date]".
6. NEXT WEEK'S PLAN — Bulleted. Each with an owner.
7. METRICS — If the engagement has tracked metrics, update them. If not, skip this section.
8. NOTES & FLAGS — Anything the client should know but that doesn't fit above.

Step 3 — OUTPUT
Generate as a branded DOCX file. Save to the Project. Create a Gmail draft to the client's primary contact, with the DOCX attached and a 4-sentence email body summarising the headline.

DO NOT SEND. Leave in drafts for my review.
```

TONE CALIBRATION:
• Match the voice of the last three status reports in this Project (they're mine).
• Be factual over flattering.
• If a blocker is the client's fault, say so politely but clearly. Do not soften to the point of obscuring.
• If we had a bad week, do not pretend otherwise. "We under-delivered on X because Y" lands better than "progress continues".

EXPECTED OUTPUT

Three Gmail drafts ready for your Friday review, each about 350-500 words. You'll spend 5-10 minutes per draft editing tone and catching anything the automation missed. On a good week, two go out with no edits. Total time: 20-30 minutes instead of 3 hours.

VARIATIONS

- Stripped-down version for retainer clients: 'For clients on a retainer rather than project: replace the PROGRESS/IN FLIGHT sections with a THEMES section covering the advisory conversations of the week.'
- Exec-summary overlay: 'Additionally, produce a single 120-word executive summary across all three clients for my managing partner.'
- Slack version: 'For Client C, which prefers Slack over email: produce the status as a Slack canvas instead of a DOCX, with anchor links.'

GOTCHAS

- The metrics section will be wrong in the first few weeks unless you've clearly defined what to track. Spend an hour upfront defining metrics per client.
- The 'tone calibration' step is critical. Without the last three reports in the Project as reference, Claude defaults to corporate generic.
- Drafts, not sends. Never authorise auto-send of client-facing communications. The 20 minutes you save isn't worth the one misfire.
- If a client week was bad, the instinct is to suppress or soften. Don't. Claude handles 'bad news honestly' better than humans do, and clients notice the consistency.

No. 06 Board-Pack Diagrams

Clean Mermaid flows, org charts, and strategy frameworks — inline, exportable, presentation-ready.

SETUP

- Have your raw content ready: the process you want to diagram, the org you want to chart, or the framework you want to illustrate.
- Know your output format preference: Mermaid (editable, code-based), SVG (vector, universal), or a PowerPoint-ready PNG.
- If the diagram will go in a specific deck template, have the template's colour palette handy.

THE PROMPT

```
I need a board-pack-quality diagram for an upcoming deck. Use the Visualizer to produce an SVG diagram inline.

CONTENT:
[Describe what you want diagrammed. Examples: a 6-step process, a 3-tier org structure, a 2x2 positioning matrix, a value-chain flow, a decision tree, a timeline.]

STYLE REQUIREMENTS:
• Aspect ratio: 16:9 so it drops into a slide cleanly
• Colour palette: [SPECIFY — e.g., "muted: slate grey, off-white, single accent in [hex]"]. Avoid bright primary colours.
• Typography: clean sans-serif. No Comic Sans. No Papyrus.
• Hierarchy: the single most important element should be visually dominant. Support elements should support, not compete.
• No clipart. No generic icons unless they materially aid understanding.
• Leave breathable negative space. Board packs die from density.

CONTENT REQUIREMENTS:
• Every label should be readable when the slide is projected 20 feet away. No label smaller than 12pt equivalent.
• No more than 7 primary elements. If the diagram needs more, split it into two.
• Directionality (arrows) should be consistent. Left-to-right for processes, top-to-bottom for hierarchies, radial for ecosystems.
• If the diagram represents data, the proportions should be accurate. No "representative" shapes.

OUTPUT:
Produce the SVG inline. Then provide:
1. A 40-word caption for the slide notes.
2. An export-ready PNG version at 1920x1080.
3. An editable Mermaid version if the diagram is a flowchart, sequence, or state diagram.
4. A one-sentence critique of your own output — where would a senior designer push back?
```

EXPECTED OUTPUT

An inline SVG you can right-click to save, plus caption text and a self-critique that's often more useful than the diagram. Claude's self-critique typically identifies one real improvement; apply it and regenerate for a better second pass.

VARIATIONS

- For a specific framework: 'Produce a 2x2 matrix with axes [X] and [Y]. Place the following competitors: [list]. Include a brief rationale for each placement.'
- For an org chart: 'Produce a three-tier org chart for a 40-person consulting firm. Realistic span of control. Show reporting lines clearly. Colour-code by function.'
- For a process map: 'Produce a swimlane diagram for our client onboarding process. Five swimlanes: Client, Account Manager, Delivery Lead, Ops, Legal. Show handoffs explicitly.'

GOTCHAS

- Claude's first diagram is often too busy. The self-critique step is worth taking seriously — ask for a v2 that addresses it.
- Colour palettes: if you give a bad palette, you get a bad diagram. 'Modern', 'professional', 'clean' are not palettes. Hex codes or Pantone references are.
- SVGs embedded from Claude sometimes don't render correctly in PowerPoint on Windows. Export as PNG for slide decks; keep SVG for anything that will render in a browser.
- For organisational diagrams, Claude will faithfully render what you describe. If you describe an irrational org, you get an irrational chart. Pre-edit your structure.

No. 07 Proposal Pricing Calculator

An interactive HTML pricing configurator your prospect plays with — and you watch them play.

SETUP

- Claude Design access (Pro, Max, Team, or Enterprise — currently web only).
- Have ready: your pricing logic in plain English. Modules, tiers, multipliers, discounts, everything.
- Your brand kit (logo, fonts, primary colour, secondary colour) for visual consistency.
- Decide: will this be hosted on your domain, or sent as a published Artifact URL? If hosted on your domain, you'll download the HTML.

THE PROMPT

```
I am building an interactive pricing calculator for [CLIENT NAME]'s proposal. The prospect will play with sliders,
checkboxes, and selectors to configure their engagement and see the price update live. Use Claude Design.

PRICING LOGIC:
[Paste your pricing logic in plain English. Example:]
Base engagement: $40,000 for a 6-week scoping phase.
Add-on modules, each priced independently:
  • Stakeholder interviews: $2,000 per interview, minimum 6, maximum 20.
  • Market research: $15,000 flat.
  • Workshop facilitation: $8,000 per workshop, 1-4 workshops.
  • Implementation support: $6,000 per week, 4-12 weeks.
Discounts:
  • 10% off total if they commit by end of quarter.
  • Additional 5% off if they refer another client.

UX REQUIREMENTS:
• The prospect should understand the math at a glance. Show component pricing clearly, not just the total.
• Sliders for numeric inputs. Toggles for yes/no. Dropdowns only for genuine choices.
• Live total updates as they interact. Breakdown visible below the total.
• "What's included" expandable section for each module.
• A "contact us" button at the bottom that opens a pre-filled email to me with the selected configuration in the body.
• No account creation, no email capture upfront. Friction kills conversion.

BRAND:
• Primary colour: [HEX]
• Logo: [will upload]
• Font pairing: [SPECIFY, or "pick something elegant"]
• Tone: [professional / playful / understated — pick one]

TECHNICAL REQUIREMENTS:
• Single self-contained HTML file (I will host it at [URL]).
• Mobile-responsive. Test at 375px and 768px widths before you finish.
• No external dependencies that require CDN fetches except Google Fonts.
• Include basic analytics hooks (just placeholder event fires) — I'll wire them to Plausible.

OUTPUT:
```

> Produce the HTML artifact. Then provide:
> 1. A 60-word description I can use in the proposal email that sends this link.
> 2. Three suggested "micro-conversion" events I should track (what the prospect does that signals seriousness).
> 3. A note on what to do if the prospect configures the minimum vs the maximum — what does each signal about fit?

EXPECTED OUTPUT

A working HTML file, typically 400-800 lines. It renders cleanly in Claude's Artifact preview; you download it, test locally, and either host on your domain or share via published Artifact URL. The three micro-conversions are often the most valuable part — they reframe the calculator as a qualification tool, not just a price display.

VARIATIONS

- Lightweight version: 'Skip the brand kit and sliders. Build a three-tier comparison table (Bronze/Silver/Gold) with checkmarks. Fastest to ship, lowest friction.'
- High-touch version: 'Add an "executive mode" toggle that strips all pricing and replaces with "investment ranges" for senior buyers who don't configure their own proposals.'
- Embedded version: 'Build as an iframe-embeddable widget I can drop into an existing page on our website, not a standalone page.'

GOTCHAS

- Prospects can game this. Assume they will. Set sensible minimums and maximums that protect your margins.
- Showing prices before discovery shortens the sales cycle but filters out some buyers who would have paid more after discovery. Know which tradeoff you want.
- The 'contact us' email prefill is the most important feature and the one Claude gets wrong most often. Test it yourself before sending the link.
- If your pricing logic is genuinely complex (volume discounts that stack, conditional pricing, regional variations), don't do it in HTML. Claude will simplify and you'll have pricing errors.

No. 08 Market Map One-Pagers in Under an Hour

A client-ready competitive landscape with logos, positioning, and analytical commentary — end-to-end in 45 minutes.

SETUP

- Claude Design (web only) with web capture tool access.
- A list of 10-20 competitors with URLs.
- Your client's brand kit — this one-pager will be read as yours, so it should look like yours.
- A one-paragraph brief on the market segment you're mapping (this focuses the analysis).

THE PROMPT

```
Produce a client-ready market map one-pager using Claude Design. I'll provide the competitor list; you do the capture, analysis, and layout.

MARKET SEGMENT:
[One-paragraph description. Example: "Mid-market revenue intelligence platforms for B2B SaaS sales teams of 50-500 reps. Excludes enterprise-only solutions (Gong, Clari's enterprise tier) and consumer-grade tools."]

COMPETITORS TO MAP:
[List 10-20 company names with their website URLs, one per line.]

TASK:
1. CAPTURE
For each competitor, use the web capture tool on their homepage. Extract:
• Their headline value proposition (the big statement above the fold)
• 3-5 descriptors of who they serve
• Pricing signal (enterprise-only, published pricing, tier-based, etc.)
• Visual tone (colour, typography, imagery style)

2. ANALYSE
Place each competitor on a 2x2 matrix. Axes are YOUR call based on what the segment actually competes on — pick the two dimensions that are most diagnostic. State your axis choice and why.

Produce:
• The 2x2 matrix with all competitors placed, with logos
• A "clusters" commentary — 3-5 groupings with a one-sentence characterisation of each
• A "whitespace" call-out — where is no one competing?
• A "posture shifts" observation — which competitors have repositioned recently?
• A single "what this means for my client" paragraph

3. DESIGN
This is client output. Treat it as a designed document, not a default.
• My brand kit: [UPLOAD]
• Format: A3 landscape, one page, print-ready
• Typography: clean, editorial. No Inter. No Comic Sans obviously.
• Hierarchy: the 2x2 is the hero. Commentary wraps around it.
```

```
• Include: my firm logo, date, "prepared for [CLIENT NAME] — CONFIDENTIAL"

OUTPUT:
Produce the designed one-pager as a Claude Design artifact, export-ready to PDF and PNG.

Separately, produce a 200-word talk track for me to use when walking a client through the map live.
```

EXPECTED OUTPUT

A designed A3 landscape one-pager, ready to drop into a client deliverable. Talk track included. Total time from prompt to output: 30-45 minutes, mostly Claude's capture and analysis time. You'll edit the 'whitespace' call-out and the client-specific paragraph; the rest ships as-is roughly 70% of the time.

VARIATIONS

- Multi-view version: 'In addition to the 2x2, produce a second view: a value-chain map showing where each competitor plays (data, analytics, workflow, enablement).'
- Time-series version: 'Do the same analysis but contrast "today" vs "2 years ago". Capture Wayback Machine snapshots where possible. Show the drift.'
- Deep-dive companion: 'After the one-pager, produce 5 one-page profiles of the competitors you identified as most threatening to my client.'

GOTCHAS

- The web capture tool hits rate limits. For 15+ competitors, expect it to take longer than you think.
- Axis choice matters more than anything else. If you accept Claude's first axis suggestion without pushback, you often get 'price vs features', which is useless. Ask for three axis options with reasoning, then pick.
- Logo quality varies. Small logos pulled from favicons look unprofessional. Ask for high-res logo sourcing explicitly, or upload logos yourself for the top 8 competitors.
- Private/early-stage competitors are hardest — their positioning on public sites is often misleading or absent. Flag these in the commentary instead of guessing.

No. 09 Interview Coding at Scale

Forty interview transcripts become a grounded-theory spreadsheet with themes, quotes, and sentiment — overnight.

SETUP

- All interview transcripts in a single Claude Project. Consistent naming helps: 'Interview-01-JohnDoe-VP-Operations.txt'.
- A research guide or hypothesis document uploaded as context.
- A codebook — either existing (from pilot interviews) or to be developed from scratch by Claude.
- Destination: an Excel sheet. Decide column structure in advance.

THE PROMPT

```
I'm running a qualitative research study with [NUMBER] interview transcripts. I need you to do thematic coding at scale and produce a structured spreadsheet.

RESEARCH QUESTION:
[One paragraph. Example: "Understanding why mid-sized manufacturers (200-1000 employees) adopt or reject AI-powered quality control systems, and what role different stakeholders play in the decision."]

STAKEHOLDER MAP:
The interviews span [list roles — e.g., "plant managers, quality engineers, CIOs, CFOs, operations VPs"].

TASK — TWO PHASES:

PHASE 1: CODEBOOK DEVELOPMENT
[CHOOSE ONE:]
(a) I have a codebook uploaded — use it as-is.
(b) I have a codebook uploaded — use it, but flag themes that appear and are not in it.
(c) No codebook — develop one from the first 10 interviews. Present it for my approval before proceeding.

The codebook should have 15-25 codes across 3-5 code families. Each code needs: name, definition, inclusion criteria, exclusion criteria, example quote.

PHASE 2: CODE THE CORPUS
For each interview, produce a row in the output spreadsheet with:
• Interviewee ID, role, company size
• Top 5 codes applied (in frequency order)
• Strongest verbatim quote (max 30 words, paraphrased if longer)
• Sentiment on the core question (strongly positive / positive / neutral / negative / strongly negative)
• Confidence level (high / medium / low) with a one-line reason if below high
• Novel theme flag (yes/no with one-line description if yes)
• Internal consistency score (does their story hold together, or are they contradicting themselves?)

OUTPUT:
1. Excel spreadsheet with one row per interview, one sheet per code family for cross-interview views
```

```
2. A 500-word thematic summary identifying: the 3-5 dominant themes, the 2-3 outlier voices, and the 2-3 tensions across the corpus
3. A "research questions raised" section — things that came up and should be followed up in a second wave

RIGOUR CHECKS:
• No confabulation. If a theme isn't supported by at least 3 interviews, flag it as "weak signal".
• Preserve contradictions. Don't smooth them out — they're usually the most valuable finding.
• Quote accurately. When in doubt, over-cite rather than paraphrase.
```

EXPECTED OUTPUT

A spreadsheet ready to hand to a research team, plus a narrative summary that often surfaces patterns you didn't see when you ran the interviews. Total Claude time on 40 interviews: ~15-20 minutes. Your review time: 2-3 hours, mostly on the summary. Compared to manual coding (weeks), this is the single largest productivity lift of any use case in this compendium.

VARIATIONS

- Mixed-methods: 'Additionally, cross-reference with the survey data I'll upload. Flag interview statements that contradict the survey aggregate.'
- Longitudinal: 'These are wave-2 interviews; wave-1 is in the Project already. Code both waves and produce a change-over-time analysis.'
- Stakeholder-contrast view: 'Produce a second spreadsheet that compares themes across stakeholder roles. Where do CIOs and plant managers see the same issue differently?'

GOTCHAS

- Transcripts must be clean. Automatic transcription errors (wrong speaker attribution, mishearing key terms) will propagate into codes. Spend an hour cleaning transcripts before running.
- Claude's 'strongest quote' selection is biased toward articulate speakers. Senior people with polished media training over-index. Rebalance manually.
- The novel-theme flag is genuinely useful but will produce false positives early. After coding 10 interviews, re-run phase 1 to let Claude consolidate the codebook before continuing.
- Do not use this for interviews that will be published or used in litigation. Have a human do the final code application for defensibility. Use this for internal strategic research.

No. 10 Stakeholder Summariser for Long Slack Threads

A 400-message thread becomes a BLUF, decisions, owners, and next steps in two minutes.

SETUP

- Slack MCP connected to the workspace where the thread lives.
- The thread URL or permalink handy.
- Know your audience for the summary — 'my managing partner' produces different output than 'the client'.

THE PROMPT

```
I need you to summarise a long Slack thread for me. Use the Slack MCP to read it.

THREAD: [PASTE SLACK PERMALINK]

AUDIENCE FOR THE SUMMARY: [WHO — e.g., "my managing partner, who has been CC'd but hasn't followed along"]

PRODUCE:

## BLUF — Bottom Line Up Front
One sentence. If [AUDIENCE] reads only this line, what do they need to know?

## CONTEXT
3-4 sentences setting up what this thread is about, for someone who is joining mid-stream.

## DECISIONS MADE
Bulleted list. For each decision:
• What was decided
• Who decided it (by name)
• When (date, or "during the thread" if unclear)
• What was the alternative that was rejected, and why

## OPEN QUESTIONS
Numbered list. Questions raised but not resolved.

## ACTION ITEMS
Table: Owner | Action | Due | Status (known or inferred)

## STAKEHOLDER POSITIONS
Bulleted. For each major voice in the thread, one sentence on what they argued for and whether they got it.

## TENSIONS OR DISAGREEMENTS
If present. Flagged plainly, without softening. Disagreements that were smoothed over in the thread should be surfaced here.

## WHAT I'D DO IF I WERE [AUDIENCE]
Your opinion. 2-3 sentences. Frame as recommendation, not fact.
```

```
## ONE-LINE SLACK REPLY
A draft reply I could post in the thread to summarise and close the loop, if appropriate. 40 words max.

RULES:
• Name people by their real Slack display names.
• Cite message timestamps for any direct quote or specific attribution.
• Do not summarise away the conflict. If two senior people disagreed, say so.
• If the thread devolved into unproductive back-and-forth after a certain point, say where.
• If the decision is actually still open despite appearances, say that.
```

EXPECTED OUTPUT

A 1-page structured summary that takes a 400-message thread down to something a partner can process in 90 seconds. The 'tensions or disagreements' section is the most valuable and the most frequently missing from human-written summaries. Claude surfaces it because it doesn't care about the politics.

VARIATIONS

- Client-facing version: 'Produce this as a formal status note for the client who asked for an update. Remove internal disagreements; preserve substantive content.'
- Red-team version: 'After the summary, write a 3-bullet red-team take: what are we overlooking in this thread?'
- Meeting-prep version: 'Frame the output as a pre-read for the meeting scheduled for [DATE/TIME]. End with 3 questions the meeting should answer.'

GOTCHAS

- Slack permissions matter. If the MCP is connected with a restricted account, it won't read private channels. You'll get an incomplete summary without warning.
- Emoji reactions carry information. Ask Claude to note high-reaction messages as 'landed well' signals.
- The 'what I'd do' section is surprisingly good but will sometimes be wrong in ways only you can see. Use it as a prompt for your own thinking, not as a conclusion.
- Do not paste the summary back into the same thread without review. Claude sometimes surfaces tensions in summary form that the thread participants had tacitly agreed to leave buried.

No. 11 Meeting-Prep Briefings the Night Before

At 21:00 each evening, tomorrow's meetings arrive as individual briefings. Who, context, warm threads, likely asks.

SETUP

- Connect MCP servers: Google Calendar or Outlook Calendar, Gmail or Outlook email, LinkedIn (if available), and your CRM if you have one.
- Create a Claude Routine (cloud-run) or Cowork scheduled task (desktop-run).
- Set schedule: weekdays at 21:00 local time.
- Have a 'meeting prep rules' document uploaded as reference — your firm's preferences on depth, what to always include/exclude.

THE PROMPT

```
Create a Routine called "Tomorrow's Meetings" that runs every weekday at 21:00 local time.

TASK:
Read tomorrow's calendar. For each meeting (excluding internal standups, 1:1s with my direct reports, and lunch blocks),
produce a briefing.

DEFINE THE MEETINGS TO BRIEF:
• External meetings with clients or prospects — always brief
• Meetings with 4+ external attendees — always brief
• Introductory meetings (flagged by subject line like "intro", "initial", "getting to know") — always brief
• Meetings with people I've met fewer than 3 times (check email history) — always brief
• Everything else — skip

FOR EACH BRIEFING, PRODUCE (1 page max):

## MEETING
[Title, time, location/link, attendees]

## PRIMARY ATTENDEE DOSSIER
For each external attendee, in order of seniority:
• Name, title, company
• Our relationship history (emails exchanged, past meetings, introductions)
• LinkedIn summary — current role, recent posts or position changes, career arc in 2 sentences
• Their firm's recent news (last 60 days)
• Mutual connections worth noting (especially if they're weak ties who could warm the room)

## CONTEXT
Why are we meeting? Pull from:
• The meeting invite description
• Recent email threads with any attendee
• CRM notes if available
• Who originated the meeting and what they said at origin
```

```
## WARM THREADS
Things to build on. Previous conversations, recent wins of theirs to congratulate, shared interests surfaced in past exchanges.

## LIKELY ASKS
What will they probably want from us? Three most likely. For each, one line on how I should respond.

## MY LIKELY ASKS
What do I want from this meeting? Three candidates. Most important first.

## LANDMINES
Topics to avoid or handle carefully. Past tensions. Competitors they have ties to. Deals that went sideways.

## ONE THING
If I only remember one thing from this briefing when I walk in, what should it be?

DELIVERY:
Email all tomorrow's briefings as a single digest to me at [EMAIL] at 21:00. Subject: "Tomorrow: [N] meetings — [first meeting title]".
Also save each briefing as a separate Markdown file in Project "Meeting Briefings".

If there are zero meetings to brief (common on Fridays or holidays), email me a one-liner confirming so.
```

EXPECTED OUTPUT

A nightly email with focused briefings for the next day's substantive meetings. You'll skim each in 90 seconds. On Monday mornings after a weekend, this is the single most useful automation you will have.

VARIATIONS

- Add tomorrow's travel: 'If I have travel tomorrow, also include: weather at destination, flight status if the flight is in my email, and a reminder of anything I need to pack.'
- Post-meeting follow-up: 'Also produce: for each meeting that happened TODAY, a draft thank-you-and-next-steps email based on my post-meeting calendar notes.'
- Depth control: 'Produce a terse version — 150 words max per meeting — by default. I'll reply "expand [meeting name]" for the full briefing if I need it.'

GOTCHAS

- LinkedIn data via MCP is brittle. If a connection is logged out, profiles return limited data. Check your LinkedIn MCP status weekly.
- The 'landmines' section is the highest-value and highest-risk. It can surface things your spouse / partner / assistant would never say aloud. Decide whether you want to see those.
- CRM data is often stale. Claude will treat it as current unless instructed otherwise. Add 'flag CRM entries older than 6 months' to the prompt.
- Don't run this at 6am the morning of. 21:00 the night before gives you overnight to absorb and, occasionally, prep a proper response to a likely ask.

No. 12 Voice-of-Customer Synthesis

Gong transcripts, NPS comments, and support tickets fused into the top seven themes, with verbatim quotes, in one afternoon.

SETUP

- Export: the last 90 days of Gong/Fathom call transcripts (redact sensitive if needed), the last 180 days of NPS verbatims, and the last 90 days of support tickets filtered to feedback-type (not break/fix).
- Upload all to a single Claude Project.
- Have your product taxonomy handy — feature areas, module names — so themes can be tagged correctly.
- A Skill for VoC format, if you do this regularly. If not, the prompt below includes inline format rules.

THE PROMPT

```
You are performing a voice-of-customer synthesis across three data sources. Produce a single coherent output that is
trustworthy to senior product and revenue leadership.

SOURCES IN THIS PROJECT:
1. Sales call transcripts (Gong exports): [N] calls, date range [X] to [Y]
2. NPS verbatims: [N] responses, NPS score distribution attached
3. Support tickets (feedback-type only, not break/fix): [N] tickets

PRODUCT TAXONOMY:
[PASTE FEATURE AREAS / MODULE NAMES]

TASK:

PHASE 1: CATEGORISE
For each piece of customer feedback across all three sources, tag with:
• Source type (call / NPS / ticket)
• Customer segment (from existing CRM fields)
• Product area (from taxonomy)
• Sentiment polarity (positive / negative / neutral)
• Topic cluster (emerge from the data; don't predefine beyond the taxonomy)

PHASE 2: SYNTHESISE
Produce:

## THE TOP 7 THEMES
For each theme, a one-page treatment with this structure:
• Theme name (specific, not "usability issues")
• Prevalence — how many data points support it, across which sources
• Segment skew — which customer segments voice this most
• Three verbatim quotes (exact, with source attribution)
• The "hidden" driver — what's really going on beneath the surface complaint
```

```
• Urgency signal — is this trending up or down over the 90-day window?
• Connects-to — which other themes reinforce or contradict this one

## DIVERGENCES ACROSS SOURCES
Sales calls are where people posture. NPS is where they're curt. Support is where they're frustrated.
• Where do the three sources tell a consistent story? (High confidence themes.)
• Where do they contradict? (The contradictions are usually the most interesting finding.)
• What shows up in one source but not the others? What does that tell us?

## SIGNAL vs NOISE
• Which themes are systemic?
• Which are one-loud-customer-with-an-axe-to-grind?
• Which are real but already being addressed?

## UNKNOWNS
• What would we need to ask, specifically, to resolve remaining ambiguities?
• Draft the three highest-value questions for a follow-up research wave.

DELIVERY:
Produce as a DOCX. Include an executive summary (exactly 300 words) at the top for the leadership team. Include a spreadsheet appendix with every tagged data point for auditability.

RIGOUR:
• No sentiment laundering. If something's negative, don't soften to "has room for improvement".
• No made-up quotes. Every quote must be real and attributable to a source in the Project.
• No false precision. "23% of customers mentioned X" — only if you can actually count.
```

EXPECTED OUTPUT

A synthesis deliverable that compresses roughly 2 weeks of traditional research work into one afternoon. The 'divergences across sources' section is usually where leadership finds its most 'huh, didn't expect that' moment. Expect to defend the methodology when presenting — have the appendix ready.

VARIATIONS

- Competitive overlay: 'Additionally, parse any mentions of competitors in the verbatims. What are customers saying about us vs them?'
- Churn-focus: 'Filter for customers who churned or downsized during the window. What did they say before they left?'
- Product-area deep-dive: 'Constrain the analysis to the [SPECIFIC PRODUCT AREA]. Ignore everything else. Produce 10 themes instead of 7 because the lens is tighter.'

GOTCHAS

- The 'hidden driver' interpretation is where Claude sometimes over-reaches. Flag any hidden-driver claim that doesn't have at least three supporting quotes.
- Sales call transcripts are performative. Sales reps shape what customers say by how they ask questions. Claude doesn't know that. Discount sales-call themes by one confidence level.
- NPS verbatims are short and emotional. They skew toward poles. Don't treat them as representative of the middle of your customer base.

- If you do this monthly, build a Skill. Running it from scratch each time is wasteful, and the Skill forces consistency in how you define themes.

No. 13 Change-Management Comms Kit

One change, three audiences, three formats — in the time it used to take to draft one.

SETUP

- A clear description of what's changing (structural, technological, process, or leadership).
- Stakeholder map — who cares, who's affected, who decides.
- Your firm or client's voice guidelines — formal vs conversational, what's on-brand.
- Past comms examples uploaded for voice calibration.

THE PROMPT

```
I need a three-part change-management communications kit for [ORGANISATION] about [CHANGE BEING ANNOUNCED].

CONTEXT:
[2-3 paragraphs on: what's changing, why, who decided, when it takes effect, what's known vs still being worked out.]

TONE: [Pick — "honest-direct" / "warm-supportive" / "executive-confident" / "transition-empathic"]

PRODUCE THREE ARTEFACTS:

### 1. EXECUTIVE MEMO
Audience: C-suite, senior partners, the board.
Length: 400-600 words.
Format: Formal memo. Dated, signed, TO/FROM/RE.
Must address:
• What is changing (precisely, no euphemism)
• Why now
• Expected impact on: revenue, cost, team, customer, competitive position
• Risks and how they're mitigated
• What's expected of the recipients
• What's NOT changing (underrated — executives want to know what's stable)
Voice: Confident, factual, zero buzzwords. Any adjective must earn its place.

### 2. ALL-HANDS DECK
Audience: The full organisation.
Length: 8-12 slides.
Format: PPTX, title + body per slide. Speaker notes 2-3 sentences per slide.
Must address:
• What (simpler language than the memo)
• Why (the story, not just the logic)
• What it means for YOU (the attendee)
• Timeline with key dates
• How to get questions answered
• Who's leading the change
• Leave room for Q&A slide at the end
Voice: Clear, human, not condescending. Acknowledge uncertainty where real.
```

```
### 3. FAQ ONE-PAGER
Audience: Anyone post all-hands who still has questions.
Length: 1 page, 10-15 Q&As.
Format: Markdown, ready to publish to intranet.
Must address:
• The questions people actually ask, not the ones leadership wishes they'd ask
• The hard questions (layoffs if applicable, pay changes, role changes, timelines)
• What's decided vs what's still being worked out
• How to raise a concern confidentially
• Where to go for more information
Voice: Direct, specific, non-defensive. "We don't know yet" is an acceptable answer where true.

CONSISTENCY CHECK:
After producing all three, cross-check:
• Are any facts contradicted across the three?
• Is any concession made in the FAQ that isn't implied in the memo?
• Does the all-hands deck sell something the memo admits is uncertain?
Flag any inconsistencies explicitly and propose resolutions.

DELIVERY:
• Memo as DOCX
• Deck as PPTX
• FAQ as Markdown

Finally, produce one extra artefact: a 3-paragraph draft for the team leader's personal Slack/email post announcing the all-hands. This is the informal, human pre-read that sits alongside the formal comms.
```

EXPECTED OUTPUT

A complete comms kit that would traditionally require a communications lead 3-5 days to produce. Expect to revise the all-hands deck most heavily — decks are where voice matters most and where Claude is most generic. The consistency check at the end catches 60-80% of the errors you would otherwise have caught only after the memo had gone out.

VARIATIONS

- Layoffs specifically: 'This is a reduction in force. Follow all best practices: legal review flags, dignity in language, what's said vs what's left for in-person conversations. Include a checklist of what must happen IN PERSON and must not be delegated to the kit.'
- External version: 'In addition to internal, produce: a customer-facing version, an investor-facing version, and a press statement. Each constrained to what can be said externally given the internal version.'
- Multi-region: 'The organisation operates in [regions]. Produce region-specific variants of the all-hands deck addressing local cultural norms and labour law considerations.'

GOTCHAS

- For layoffs, do not use this without a human communications professional and employment lawyer in the loop. Claude can draft the kit; humans must own the decisions.
- The 'what is NOT changing' section is easy to skip and is the most reassuring element for senior audiences. Force it into all three artefacts.

- FAQs are hardest. If you give Claude no hard questions, it produces soft ones. Force the hard ones — especially pay, role, and timeline.
- Consistency check catches logical inconsistencies; it does not catch tonal ones. A memo that says 'exciting opportunity' and an FAQ that admits 'role reductions likely' is technically consistent but reads as gaslighting. You need to read for tone yourself.

No. 14 Expert-Interview Guide Auto-Generator

From research hypothesis to an interview guide with probes and a coding rubric in 20 minutes.

SETUP

- A written hypothesis for what you're trying to learn.
- A description of who you're interviewing (role, experience level, relationship to topic).
- Time constraint for the interview (affects number and depth of questions).
- Any prior interview guides from your firm, uploaded as style reference.

THE PROMPT

```
I'm running [NUMBER] expert interviews to test [HYPOTHESIS]. Produce a complete interview instrument and post-interview coding rubric.

HYPOTHESIS:
[One paragraph stating what you believe to be true and what you want to learn.]

INTERVIEWEE PROFILE:
[Role, seniority, sector, relationship to hypothesis. Example: "CFOs at private equity portfolio companies, 2-5 years tenure, mid-market manufacturing."]

INTERVIEW LENGTH: [X] minutes
INTERVIEW FORMAT: [Semi-structured / Structured / Conversational]

PRODUCE:

## PART 1: INTERVIEW GUIDE

### Opening (2-3 minutes)
• Thank-you and context
• Permission to record
• How the conversation will flow
• Respect for their time (state the exit time explicitly)

### Warm-up (3-5 minutes, 2-3 questions)
Low-stakes questions that ground them in their context before the core questions. Should feel conversational.

### Core Section A: [THEME]
[5-7 questions, with probes. Format:]
Q: [Main question — open-ended, non-leading, one clause]
  Probes: [3-4 follow-ups to use if the main question yields a thin answer]
  Listen for: [2-3 signals that would confirm or refute the hypothesis]
  Avoid: [What NOT to say to avoid biasing their response]

### Core Section B: [THEME]
[Same format]
```

```
### Core Section C: [THEME]
[Same format]

### Stress-test section (5-7 minutes)
Questions designed to challenge your own hypothesis. These are the ones where you might get disconfirming evidence.

### Closing (2-3 minutes)
• "Is there anything I should have asked and didn't?" (the single best research question)
• Permission to follow up
• How you'll share findings (or not)
• Genuine thanks

## PART 2: CODING RUBRIC
A table for post-interview synthesis with one row per interview. Columns:
• Interviewee ID
• Position on hypothesis (strongly supports / supports / neutral / contradicts / strongly contradicts)
• Top 3 themes raised
• Strongest quote (<30 words)
• Confidence in their response (high/med/low with reason)
• Novel insight (Y/N with one-line description)

## PART 3: PRE-INTERVIEW CHECKLIST
Things to prepare in the 15 minutes before each call.

## PART 4: POST-INTERVIEW DEBRIEF
A 5-question prompt to answer within 30 minutes of ending each call. Captures what didn't make it into the transcript — body language, tone, what they seemed reluctant to say.

RIGOUR REQUIREMENTS:
• No leading questions. "How has X been valuable?" is leading. "What has X been?" is not.
• No double-barrelled questions. One clause per question.
• No hypothetical-only questions. Anchor in their actual experience.
• Include at least 2 questions designed to surface disconfirming evidence. If I only get confirmation, either my hypothesis is trivially true or my interview is biased.
```

EXPECTED OUTPUT

A printable interview instrument plus a coding rubric that feeds directly into use case #9 (Interview Coding at Scale). The 'stress-test' and 'disconfirming evidence' sections are the differentiators — most interview guides are unintentionally designed to produce confirmation.

VARIATIONS

- Cold-outreach version: 'Also produce: the outreach email I send to get these interviews. Subject line A/B options, 150-word body, what to offer in exchange for time.'
- Workshop version: 'Adapt this from a 1-on-1 interview to a 4-person focus group. Include facilitator notes on managing dominant voices.'
- Longitudinal version: 'Produce TWO interview guides: one for initial interview, one for 3-months-later follow-up. The follow-up should explicitly revisit what they predicted last time.'

GOTCHAS

- The warm-up section is frequently skipped. Don't. Research quality degrades without it, especially with senior interviewees.
- 'Is there anything I should have asked?' at the close is the highest-ROI question in the history of qualitative research. Claude will include it; make sure you actually ask it.
- If the hypothesis is vague, the guide will be vague. Spend time on the hypothesis before running this prompt.
- Claude will sometimes generate too many questions for the stated interview length. Budget 2-3 minutes per core question, plus warm-up and closing. If the guide is too long, ruthlessly cut Section B or C.

No. 15 Sanitised Case Study from Real Engagement

Your real engagement becomes a compelling, publishable case study — client-safe, approval-ready.

SETUP

- Upload to a Claude Project: the engagement documents, your notes, final deliverables, metrics achieved.
- Have ready: what's confidential (client name, specific financials, proprietary methods) vs what's releasable.
- Your firm's existing published case studies as style reference.
- Your content goal: website asset, sales collateral, thought-leadership piece, or award submission?

THE PROMPT

```
Turn this real engagement into a sanitised, publishable case study. Preserve the substance; redact the sensitive specifics.

ENGAGEMENT CONTEXT:
[Paste or reference the documents in the Project. Client name, sector, size, engagement type, duration, outcome.]

SANITISATION RULES:
• Client name → [INDUSTRY + SIZE descriptor, e.g., "a top-5 North American specialty retailer"]
• Specific financials → directional statements (e.g., "$4.2M cost reduction" → "mid-seven-figure cost reduction")
• Proprietary methods → named generically unless they are market-publicised
• Named stakeholders → titles only
• Timelines → quarters, not months
• Tools and tech stack — redact only if the use was proprietary. If they're industry-standard, keep them.

STRUCTURE:

## CHALLENGE (150-200 words)
The business problem, framed as the client would have felt it. Emotional, not just analytical. Include the uncomfortable truth that made the problem urgent.

## APPROACH (200-300 words)
What you did. The core method. The specific judgement calls that differentiated your approach from what any decent firm would have done. Show, don't tell: cite moments and decisions, not methodology labels.

## WHAT MADE IT HARD (100-150 words)
Most case studies skip this. It's the section buyers want. What went sideways, what you nearly got wrong, what the client pushed back on.

## OUTCOME (100-150 words)
Results, sanitised. Use directional numbers where specific ones are confidential. Quote the client if you have permission.

## WHAT WE LEARNED (80-120 words)
One genuine insight — something you'd do differently, or something the engagement proved that you only suspected before. Generosity with your learning signals confidence.
```

```
## PULL QUOTE
One testimonial-style sentence, sanitised if needed. "Sanitised" means attributed to title+sector, not name+firm. If I don't have explicit quote approval, draft one that captures the essence without fabricating specifics.

DESIGN NOTES:
• Target length: 750-1,000 words total.
• Pullable stats (3-4, dispersed through the case): specific enough to feel real, sanitised enough to be safe.
• A visual opportunity callout — where in this case would a chart, quote graphic, or diagram amplify the story?

DELIVERY:
1. The sanitised case study as a DOCX, formatted for our website standards.
2. A second version: 150-word abstract for a sales one-pager.
3. A LinkedIn post version: 280 words, structured for LinkedIn algorithm (hook, story, insight, takeaway, CTA).
4. A risk register: every claim or detail in the case that, if challenged, could be traced back to the real client. Flag each as "low/medium/high" trace-back risk.
```

EXPECTED OUTPUT

A case study ready for client approval review, plus spinoff assets for different channels. The risk register is where this prompt earns its keep — it catches the 'I didn't realise that detail was uniquely identifying' problem before it becomes an embarrassing retraction.

VARIATIONS

- Award submission version: 'Additionally reformat as an award submission for [AWARD NAME]. Follow their specific structure and evaluation criteria.'
- Case study series: 'Produce three variants of this same engagement, each framed for a different buyer persona — CFO, Chief Digital Officer, Head of Operations.'
- Unflattering version: 'Write the honest post-mortem version too. What would we say about this engagement if we were recommending another firm not repeat our mistakes?'

GOTCHAS

- Never publish without explicit client approval in writing. The risk register is not a substitute for consent.
- The 'what made it hard' section is the most commercially valuable and the most politically difficult. Your firm's partners will want to soften it; buyers want it preserved. Hold the line.
- Sanitised numbers still have information. 'Mid-seven-figure cost reduction in a top-5 specialty retailer' is very identifiable. Add a tier of abstraction where needed.
- The drafted pull quote is a draft. Do not publish a drafted testimonial without real attribution, even if sanitised. That's a legal and ethical line.

No. 16 LinkedIn Thought-Leadership Factory

Your daily Claude briefs become three publishable LinkedIn posts every Friday, each in a different rhetorical mode.

SETUP

- The Daily Claude Digest (use case #4) already running — this prompt consumes its outputs.
- Your LinkedIn voice samples uploaded (prior posts that performed well, by you or in your desired voice).
- Your firm's LinkedIn guidelines (if any) on topics to avoid, disclaimers required.
- A Cowork Project scheduled task for Fridays at 14:00.

THE PROMPT

```
Every Friday at 14:00, read this week's five Daily Claude Briefs in the "Claude Daily Brief" Project. Synthesise them into three LinkedIn post drafts, each taking a different rhetorical angle.

INPUTS:
• This week's 5 daily briefs (look in Project "Claude Daily Brief")
• My LinkedIn voice samples (in this Project as voice-samples.md)
• My firm's LinkedIn guidelines (in this Project as linkedin-guidelines.md)

TASK:

## STEP 1: IDENTIFY THE WEEK'S ARC
Read all five briefs. What's the one theme, move, or signal that most mattered this week? Not just "what shipped" — what does the combined week of movement tell us?

## STEP 2: DRAFT THREE POSTS, EACH IN A DIFFERENT MODE

### Post A — CONTRARIAN
The angle most people aren't taking on this week's biggest story. Not contrarian for sport — contrarian because you've seen something others are missing. Must defend the position with a concrete reason.

Structure:
• Hook (one line, scroll-stopping, not clickbait)
• The conventional take (2-3 lines, steelmanned)
• What you actually think (4-6 lines, with evidence)
• Implication for your reader (1-2 lines)
• A question to drive engagement

Length: 280-350 words.

### Post B — TACTICAL
"Here's how to use this week's news, tomorrow, in your own work." Practical, specific, directly useful.

Structure:
• Hook that promises a specific takeaway
```

```
• 3-5 numbered or bulleted moves
• For each: what it is, why it works, how to start
• Close with the "I wish someone had told me this a year ago" line — earned, not forced
• A CTA that doesn't feel like a CTA

Length: 240-320 words.

### Post C — NARRATIVE
A story. Something that happened this week (to you, to a client, to someone you observed) that illustrates the week's theme.
Show, don't tell.

Structure:
• A cold open — drop into the moment
• 4-7 lines of the story
• The turn — what you realised
• The broader point
• A reflective close

Length: 300-400 words.

VOICE REQUIREMENTS:
• Match my voice samples. Don't over-polish.
• No LinkedIn-isms: no "I'm thrilled to announce", no "unpopular opinion", no "here's a thread" (it's LinkedIn, not X).
• Em-dashes, comma splices, and fragmented sentences allowed where they fit the voice.
• No hashtags unless the voice samples use them.

DELIVERY:
Email me at 14:30 on Friday with:
• All three drafts
• A one-line "my pick" recommendation
• A note on timing (best day/hour to post each, given the topic)

RIGOUR:
• Fact-check any claim against the source briefs. Don't embellish.
• Flag any claim I'd need to verify before posting.
• If none of this week's briefs supports a good post, tell me so, don't force one.
```

EXPECTED OUTPUT

Three LinkedIn drafts every Friday, plus a 'my pick' recommendation. Over 10-12 weeks of consistent output you'll build a recognisable posting voice, and the automation reduces content-creation friction to near-zero. Typically you'll publish 2 of the 3 after editing; the third tends to be too forced.

VARIATIONS

- Multi-platform: 'Additionally produce: an X/Twitter thread version of Post A (8 tweets), a Substack note version of Post C (500 words), and a voice memo script for Post B (90 seconds, spoken).'
- Monthly reflection: 'On the last Friday of each month, skip the three-post format. Instead produce one 1,500-word reflective essay synthesising the month.'

- Draft improvement loop: 'Additionally: read my last 8 LinkedIn posts and their engagement metrics. Tell me what pattern is working and what to double down on vs drop.'

GOTCHAS

- LinkedIn's algorithm currently rewards longer posts with multiple-line breaks. Voice-matched output may be denser than optimal. Manually break before publishing.
- The 'my pick' recommendation is useful but biased toward the tactical mode — tactical posts test safest. Sometimes the narrative or contrarian post is the better commercial bet.
- Fact-checking: Claude sometimes quietly smooths over the fact that a brief item was speculation, and the post presents it as fact. Read for this.
- Posting cadence matters more than post quality over time. Three drafts weekly is enough for 2-3 posts; resist the urge to push all three every week — you'll train your audience to expect a volume you can't sustain.

No. 17 RFP-to-Draft-Proposal

Past winning proposals, the RFP, and client research go in. A structured first draft comes out. You do the thinking; Claude does the typing.

SETUP

- The RFP shred (use case #3) already completed.
- Upload to a Claude Project: 3-5 of your firm's winning proposals from similar engagements.
- Upload the new RFP, all addenda, and any client-provided template.
- The client research from use case #1 (if applicable).
- Your firm's proposal standards: formatting, required sections, approval protocol.

THE PROMPT

```
I've decided to bid on this RFP. Using the winning-proposals reference set in this Project and the RFP itself, produce a structured first draft.

REQUIRED SECTIONS (per the RFP):
[List exactly what the RFP requires. Example: Executive Summary, Understanding of Need, Proposed Approach, Team & Qualifications, Timeline, Pricing, Case Studies, References.]

PAST WINS IN THIS PROJECT:
[List the filenames of the 3-5 winning proposals uploaded for reference.]

TASK:

## FIRST: WIN-THEMES ANALYSIS
Read the RFP carefully. Compare to the past wins. Identify the 3-5 WIN THEMES for THIS bid:
• What does THIS client need to hear to pick us?
• What worked in past wins that applies here?
• What's new here that none of the past wins addressed?
Present these as a brief before you start drafting. I will approve or revise before you draft the full proposal.

## THEN: DRAFT THE PROPOSAL
One section at a time, in the order the RFP requires.

For each section:
• Target word count from the RFP (or from past-win precedent if not specified)
• Tone matching our past wins (analyse and reproduce — don't invent)
• Every claim we make must be supportable — flag any claim that cites case-study evidence we can't produce if asked
• Cross-reference back to the win themes in every section — each section should earn its space by advancing at least one

SPECIAL HANDLING:

EXECUTIVE SUMMARY:
Write this LAST, even though it appears FIRST. Base it on the drafted body. Structure: the client's situation (they want to feel seen), our understanding of what they really need (not what they asked for), our approach in 3 sentences, why us in 2 sentences.
```

```
TEAM & QUALIFICATIONS:
Flag what biographical content I need to update (we're using the past proposal's bios as starting points). Don't rewrite bios without my input.

PRICING:
Do not draft pricing. Leave a structured placeholder with the categories I need to fill and guidance on pricing strategy given the RFP signals.

CASE STUDIES:
From the past-wins set, select the 2-3 most relevant to THIS RFP. For each, explain why it's relevant, then produce a sanitised summary formatted to the RFP's case-study requirements (word count, structure).

REFERENCES:
List the types of references I'll need (not the specific names). Flag which engagements in our past would make the strongest references for this bid.

OUTPUT:
Produce the full proposal as a DOCX matched to either the client's template (if provided) or our standard proposal format. Use proper styles for headings (so TOC works). Include all required attachments' placeholders.

ALSO PRODUCE:
1. A "red team" document: the 5 hardest questions the evaluation committee might ask about this proposal. Draft defensible responses.
2. A gap list: every specific piece of information I still need to provide before this is submittable.
3. A timeline to submission: working backwards from the due date, what must happen when.

RIGOUR:
• Do not invent credentials, certifications, or team capabilities.
• Do not overpromise outcomes. Bid-capture rhetoric is forgiven; commitments aren't.
• Flag any place where past proposals used language that wouldn't pass today's legal review.
```

EXPECTED OUTPUT

A first draft that removes 15-20 hours of typing from your proposal cycle. The red team document is often more useful than the proposal itself — it surfaces the weak points you'd otherwise only discover during oral defense. You'll still spend 6-10 hours on revision, but on thinking rather than typing.

VARIATIONS

- Competitive swap: 'Also produce: a hypothetical counter-proposal — what would our strongest likely competitor write? Use this to find our own soft spots.'
- Oral-defense companion: 'Produce a 20-slide oral-presentation deck that supports the written proposal, plus speaker notes and a Q&A preparation document.'
- Compliance matrix first: 'Before drafting, produce a compliance matrix — RFP requirement, where addressed in our proposal, page number. Build proposal to fit the matrix.'

GOTCHAS

- Bidders lose on compliance failures, not persuasion failures. The compliance matrix variation is rarely optional for government or large corporate RFPs.

- Past-win language can be dated. Claude will reproduce 'leveraging synergies' if the past wins did. Do a ruthless edit pass on buzzwords.
- Win themes are strategy decisions. Don't rubber-stamp Claude's proposed themes. Argue them out with your capture team before greenlighting the full draft.
- The gap list is where shipping happens or fails. Review it the day it's produced and triage — some gaps are small; some are the difference between bidding and no-bidding.

No. 18 Diligence Data-Room Speedrun

A 50-folder data room becomes a diligence report with risks flagged and page-numbered to source — in one evening.

SETUP

- A Claude Project with the full data-room contents uploaded (PDF contracts, financials, org charts, policies — everything).
- The transaction type: M&A target diligence / investment diligence / vendor-selection diligence / audit.
- Your diligence framework — if you have a firm template, upload it. If not, the prompt below provides a defensible default.
- Clear the evening. 50 folders isn't a 10-minute task even with Claude.

THE PROMPT

```
I'm running diligence on [TARGET / INVESTMENT / VENDOR] for [CLIENT]. Data room is in this Project. Produce a full diligence report.

TRANSACTION TYPE: [M&A / Investment / Vendor-selection / Audit]
TIMELINE: [Deal close target or report due date]
KEY QUESTIONS: [2-3 sentences on what the client most wants to know]

TASK:

## PHASE 1: INVENTORY
Produce a complete list of every document in the data room, tagged by:
• Document type (contract, financial statement, policy, org chart, etc.)
• Date or date range covered
• Parties involved
• Pages (for large documents)
• Apparent completeness (full document / excerpt / missing pages)

Flag what's suspiciously absent from a standard data room for this transaction type. "Where's the employment agreements folder?" is as important as anything in the folders.

## PHASE 2: CATEGORICAL ANALYSIS
For each of the following categories, produce a diligence note (500-800 words each):

### CORPORATE STRUCTURE & GOVERNANCE
Entity structure, ownership, board composition, related-party relationships, subsidiaries, jurisdictions.

### COMMERCIAL & CUSTOMER
Customer concentration, contracts, renewal risk, pricing structure, commercial obligations, churn signals.

### FINANCIAL
Revenue recognition, margin profile, working capital, debt, contingent liabilities, audit history.
```

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### LEGAL
Active litigation, regulatory compliance, IP ownership, key contracts' change-of-control provisions.

### PEOPLE
Key-person dependencies, retention risk, compensation obligations, termination costs, employment law exposure.

### OPERATIONAL
Systems, processes, supply chain, dependencies on critical vendors, IT/security posture.

### COMMERCIAL TERMS OF KEY CONTRACTS
The top 10 customer and supplier contracts by revenue/cost. Summary of terms. Anything unusual.

## PHASE 3: RISK REGISTER
A prioritised table:
• Risk (specific, not generic)
• Severity (high/medium/low)
• Likelihood (high/medium/low)
• Source documents (named and page-numbered)
• Mitigation options
• Whether this is a deal-breaker, a price-negotiation lever, or a post-close issue

## PHASE 4: UNKNOWN UNKNOWNS
What's the 80/20 of what you'd ask for next? The additional documents, interviews, or third-party reports that would most reduce remaining uncertainty.

## PHASE 5: RECOMMENDATION
One page. Proceed / proceed with conditions / pause / decline. Three-sentence reasoning.

CITATION REQUIREMENTS:
• Every risk-register entry must cite specific documents and page numbers.
• Every financial claim must trace to a source in the data room.
• Do NOT synthesise figures across documents without flagging the reconciliation you did.
• If a document is ambiguous, quote it directly rather than interpreting.

FORMAT:
• Full report as a DOCX, formatted for senior partner review
• Executive summary (500 words, first page) — the single page any partner or client principal will read
• Risk register as a separate Excel file for tracking
• A "questions for management" document — the 15-25 follow-up questions for the management presentation
```

EXPECTED OUTPUT

A 40-60 page diligence report completed in 4-6 hours instead of 4-6 days. Claude's citation discipline is typically excellent; its financial synthesis should be sanity-checked by an analyst. The 'unknown unknowns' section pays for the whole exercise.

VARIATIONS

- Red-flag-only mode: 'Skip the categorical analysis. Go directly to the risk register. I need a fast-path look for deal-breakers before we commit to deeper diligence.'

- Buyer-side competitive view: 'Additionally, produce a 2-page view on how a competing buyer would diligence this asset. What would they see that we might be missing?'
- Management-presentation version: 'After the diligence report, draft the agenda and question list for a 2-hour management presentation with the target.'

GOTCHAS

- Do not rely on this report unaudited for investment-committee approval. It's a first-pass synthesis, not a professional diligence deliverable.
- Data rooms are intentionally structured. Sellers put best-foot-forward information prominently. Claude will treat what's there at face value. Compensate with explicit 'what's absent?' thinking.
- Financial cross-checks are where errors most often hide. Have a human CPA audit any financial claim before it enters a deal memo.
- The 80/20 of 'what to ask for next' is often the seller telling you something by refusing to provide it. Absence of response to your data requests is data.

No. 19 Customised Client Onboarding Portal

Every new client gets a branded HTML welcome portal with their docs, schedule, contacts, and first-week roadmap.

SETUP

- Claude Design access (web).
- Your firm's brand kit and the client's brand kit.
- Standard onboarding assets your firm uses: welcome letter template, first-week agenda, contact list template.
- This client's specifics: engagement name, kickoff date, core team, communication conventions.
- Hosting plan: will this be a published Claude Artifact URL, or hosted on your domain under a client-specific path?

THE PROMPT

```
Produce a custom client onboarding portal as a single HTML artifact using Claude Design.

CLIENT: [CLIENT NAME]
ENGAGEMENT: [NAME AND TWO-LINE SUMMARY]
KICKOFF DATE: [DATE]

## CONTENT TO INCLUDE:

### HERO SECTION
A warm, professional welcome. Client logo alongside our logo. Engagement name. The start date. A one-line statement of what we're doing together — in their framing, not ours.

### THE FIRST WEEK ROADMAP
Day-by-day for the first 5 business days:
• What's happening
• Who's involved from both sides
• What deliverables they'll see
• What we need from them

### TEAM DIRECTORY
For each person on the engagement team (both sides):
• Photo, name, role, one-line bio
• How to reach them (preferred channel)
• What they're responsible for on this engagement

### COMMUNICATION CONVENTIONS
How we'll work together. Stand-up cadence, Slack channel names, where decisions are recorded, response-time expectations. Be specific.

### CURRENT STATUS
A live-feeling panel that shows:
• Phase we're currently in
```

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• % complete (even if artificial at kickoff, it anchors mental model)
• This week's milestone
• Next week's milestone

### KEY DOCUMENTS
Links to the Statement of Work, kickoff deck, shared Drive folder, project tracker. All opening in new tabs. Clearly marked if anything requires login.

### FAQ
10-12 questions. Include the awkward ones:
• What if we need to pause?
• What if we disagree with a recommendation?
• What about confidentiality?
• How are changes to scope handled?
• What happens at the end of the engagement?

### FIRST-DAY CHECKLIST
A small checkable list for the client's primary contact on Day 1:
• [ ] Confirm calendar invites received
• [ ] Grant Drive folder access
• [ ] Introduce the team in Slack
• [ ] Share the stakeholder map
• [ ] Schedule the week-2 review

## DESIGN REQUIREMENTS:
• Client's brand colours as primary; our brand as accent
• Sophisticated, not corporate-template
• Mobile-responsive (key team members may open this on phones)
• No login wall, no cookies, no tracking beyond basic analytics
• Printable as a PDF for those who want paper

## DELIVERY:
1. The HTML file, self-contained, ready to host at [URL]
2. A 60-word email template I'll send to the client's primary contact with the portal link
3. A version-control suggestion: how should I structure this so future clients get templated portals rather than bespoke ones?

## QUALITY BAR:
• This is a first impression. It represents what working with my firm will be like.
• Every link must work.
• Every name must be spelled right.
• The date formats must match the client's locale (EU vs US).
• Nothing that would embarrass my firm if the client's CEO opened it on a whim.
```

EXPECTED OUTPUT

A professional, single-file HTML portal that makes Week 1 of the engagement feel considered and high-touch. The version-control suggestion turns this from a per-client effort into an asset your firm can reuse. Clients comment on this — in our experience, roughly 60% of them volunteer that it's the best onboarding they've experienced.

VARIATIONS

- Mid-engagement version: 'Adapt this for a mid-engagement status portal — live-updating status, latest deliverables, upcoming decisions. Think "always-on dashboard", not "welcome page".'
- Multi-stakeholder version: 'Produce three variants of this portal tailored to different audiences: the client sponsor, the operational team, the steering committee. Same core, different depth.'
- Post-engagement wind-down: 'At the end of the engagement, produce a portal that packages everything delivered, lessons learned, recommendations for what they do next, and our offer for ongoing support.'

GOTCHAS

- Client logos: have proper permission and get a high-res version. Pixelated client logos in an onboarding portal signal amateur.
- Don't put confidential engagement details in a Claude-published Artifact URL. Those URLs are unlisted but public. Host on your domain with client-specific access instead.
- The FAQ section is the most valuable and the most often softened. Keep the awkward questions — clients feel seen.
- Dates and locales matter more than you think. A US firm sending a UK client a portal with US date format is a small signal of inattention. Claude will follow your instruction; instruct explicitly.

No. 20 Assumption-Challenger Agent

Before any client send, Claude reads your strategy memo and returns the three strongest counter-arguments.

SETUP

- A custom Skill titled 'Red Team' that you activate manually for any memo, strategy document, or recommendation.
- A small set of example red-team critiques you've admired, uploaded as style reference.
- Optional but valuable: a folder of actual strategy failures you've studied (postmortems, case studies) — trains the counter-argument depth.

THE PROMPT

```
Activate red-team mode. I'm going to paste a strategy memo / recommendation / analysis. Your job is to attack it.

PASTED DOCUMENT:
[PASTE YOUR DRAFT HERE]

TASK:
Produce a structured red-team critique.

## PART 1: THE THREE STRONGEST COUNTER-ARGUMENTS

For each, produce a one-page treatment:

### Counter-argument 1: THE ASSUMPTION YOU'RE NOT EXAMINING
What unstated premise underlies the whole memo? If that premise is wrong, does the recommendation still hold? Be specific. Not "the assumption that markets are rational" — something testable, like "the assumption that customer X will sign the MSA in Q2 is doing a lot of load-bearing work in this memo."

### Counter-argument 2: THE EVIDENCE YOU'RE UNDERWEIGHTING
What evidence exists — in the data I've uploaded, in public information, or in the history of similar situations — that cuts against the recommendation? Why have I (in this memo) given it less weight than it deserves?

### Counter-argument 3: THE STAKEHOLDER VIEW YOU'RE MISSING
Whose perspective isn't represented here? If I walked this memo to the group most likely to object, what would they say that I haven't addressed?

For each counter-argument, state:
• The steel-manned version (the strongest form of the objection)
• The specific parts of my memo it targets
• What evidence would make me update my view
• How I should address it in a revision — either defend, acknowledge, or revise

## PART 2: THE PRE-MORTEM
Assume the recommendation was followed and failed badly in 18 months. Write the 300-word post-mortem:
• What was the proximate cause of failure?
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• What was the root cause?
• What signal was visible at the time of the original memo that was ignored?

## PART 3: THE UNASKED QUESTION
What question is my memo structured to avoid answering? Name it plainly. This is the most uncomfortable part of red-teaming — there's often one question that, if asked directly, would complicate the recommendation. Surface it.

## PART 4: RIGOUR CHECKS

### Logical
Are any arguments circular? Do any conclusions exceed what the evidence actually supports?

### Comparative
Are there other options not considered? Specifically, three options I should have evaluated and dismissed, but didn't even evaluate.

### Practical
What could go wrong in execution that the memo doesn't plan for?

### Political
What incentive structures are in play that might be shaping my analysis (mine, the client's, the client's boss's)?

## PART 5: THE VERDICT

After all of the above:
• Is the recommendation defensible? (Yes / Yes-with-revisions / No)
• If Yes-with-revisions — what are the 3 minimum changes?
• If No — what would the defensible recommendation look like instead?

TONE:
• Blunt. This is a private review, not a client meeting.
• Specific, not generic. "This is vague" is not useful; "the ROI claim in paragraph 4 assumes Q3 uptake matches the best historical quarter, which happened once" is useful.
• Generous to what's strong. Red-teaming isn't "say everything is wrong" — it's finding what's actually weak.
```

EXPECTED OUTPUT

A two-to-three page structured critique that catches the errors you would have discovered only during the client meeting. Over time, as you use this Skill repeatedly, your first drafts will get stronger because you'll anticipate what the red team will flag. That self-improvement loop is the real ROI.

VARIATIONS

- Steel-man mode instead: 'Before critique, produce the absolute strongest version of my memo. Then red-team the strongest version. This catches blind spots I'm missing even in my own best-case argument.'
- Opposing-counsel mode: 'Imagine you're being paid by the party most disadvantaged by my recommendation. Make their case. Don't worry about fairness — your job is to win for them.'

- Senior-partner mode: 'Critique this memo as the most cynical, experienced senior partner in my firm would. The one who has seen every pitch, every recommendation, every war story. What would make them roll their eyes?'

GOTCHAS

- This Skill is most valuable when you don't want to use it. Those are exactly the memos that need it most.
- Claude can be soft in red-team mode by default — its training favours agreement. The 'blunt' tone instruction is load-bearing. Without it, you get mild critique dressed as red-teaming.
- Don't share the red-team output with the client. It's for your use. Sharing it undermines your own recommendation.
- If the red-team output is weak, it usually means the memo was actually defensible. But verify — sometimes it means your Skill's rules haven't been tuned enough. Calibrate against cases where you knew a memo was weak.

Afterword

the part you write yourself

These are the prompts I run. Yours will be different in ways that matter. The setup list will be customised to your stack. The prompt body will absorb your firm's voice. The gotchas you learn in your first month will not be the gotchas I listed.

Keep a prompt journal. After each run, note what you changed, what surprised you, what you'd do differently. In three months you'll have a personal prompt library worth more than this whole book.

> *The best prompts are like the best writing — they sound like one person thinking clearly. Make these yours.*

Volume III — if there is one — will contain the prompts for the other 80 use cases from Volume I. If you found this volume useful, tell me what you'd want to see first. The feedback shapes the next edition.

Appendix · Further Reading

The field moves too quickly for any single document to stay authoritative for more than a few weeks. The following sources are durable enough to be worth bookmarking. Your Digest Playbook (Section V) should ingest most of them automatically.

Canonical Anthropic Sources

- anthropic.com/news — product announcements and research posts
- anthropic.com/engineering — technical deep-dives
- claude.com/release-notes — consumer product changelog
- code.claude.com/docs/en/changelog — Claude Code changelog
- docs.claude.com — the documentation hub

Community & Press

- r/ClaudeAI on Reddit — builders sharing workflows
- The Information — leaks and strategic reporting
- TechCrunch, VentureBeat, The Verge — launch coverage
- aimaker.substack.com — quarterly Claude guides

Your Own System

The most useful 'source' you will ever have is the one you build yourself, using Section V of this compendium. Start it today. Revisit this appendix in three months — you will want to prune half of it and replace it with your own curated list.

End of Compendium

Compiled by SuRaM, Principal Consultant at Forcey.

SuRam@Forcey.in · linkedin.com/in/sura69 · www.Forcey.in

If this compendium was useful, please tell another consultant.

If it was not, please tell me.