GIVE CLAUDE A JOB, NOT A QUESTION

Claude Cowork playbooks by role at Inspired Solutions

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25 minutes

BEFORE YOU START

CHECK TWO SETTINGS

Model: Fable 5.1. Effort: Low or Medium. Change the effort only when the job earns it.

SETTING	WHAT TO PICK	WHY
Model	**Fable 5.1** (the current release in the Fable line)	The most capable model available to us. Older picks (Sonnet, Opus 4.8) are still in the menu; do not use them. Check the model name at the top of every new Cowork chat.
Effort	**Low** for daily work. **Medium** when the job has several steps or several files.	Effort is how long Claude thinks before it answers. More effort burns more of your usage window on every message. Low and Medium handle the jobs in this deck.
High or Extra High	Only for a proposal volume, a compliance package, or a multi-agent build that Rick has asked for	These settings empty your five-hour usage window in one session. If you think a job needs High, ask first.

Rule of thumb: start every job on Low. If the output misses the point, move to Medium and run it again. Do not start on High to be safe. Effort does not fix a bad prompt; the 5-line job brief does.

Where to find it: the model picker and effort selector sit next to the message box in Claude Desktop and Cowork. Set them once per chat; they stay for that chat.

THE ONE RULE FOR TODAY

A QUESTION GETS A PARAGRAPH.
A JOB GETS A DELIVERABLE.

QUESTION	JOB
How should I follow up on this quote?	Read the last 30 days of email with this customer, list every open quote, and draft one follow-up per quote in my voice into Drafts.
What is in this RFP?	Read every file in this folder, build the compliance matrix as an Excel file, and flag anything that disqualifies us.
Summarize this transcript.	Read the transcript, write the meeting notes in our format, and create one Monday.com item per action item with an owner and a due date.

THE METHOD

THE 5-LINE JOB BRIEF

Type these five lines every time until it is muscle memory.

1 **Input:** the folder, email thread, Monday.com board, or file it reads.

2 **Role:** who Claude is for this job (act as our proposal compliance lead).

3 **Output:** the artifact you want (Excel, Word, draft email, Monday.com item) and its name.

4 **Rules:** what it must not do (no sending, no pricing, no guessing).

5 **Review:** what you will check before it leaves your hands.

EXAMPLE BRIEF

Input: the Quotes folder and my inbox for the last 14 days. **Role:** inside sales coordinator. **Output:** one Excel file named Open Quotes 2026-09-04 with customer, quote number, amount, date sent, last customer reply, and next step. **Rules:** read only, do not send anything, mark any field you cannot confirm as Unavailable. **Review:** I will spot-check three rows against the source emails.

JOB 1 · INSIDE SALES

THE OPEN QUOTE SWEEP

DESI · SYREZ

Every open quote, its age, and the next move, in one spreadsheet, every Monday before the sales meeting.

COPY-PASTE PROMPT

```
Read my Outlook sent and inbox folders for the last 21 days and
the Quotes folder in this project. Act as our inside sales
coordinator. Build an Excel file named "Open Quotes YYYY-MM-DD"
with these columns: customer, quote number, product summary,
date sent, days open, last customer reply (date and one line),
and recommended next step. Sort by days open, oldest first.
Then draft one follow-up email per quote older than 7 days, in
my voice from my voice profile, and save each to my Drafts
folder. Do not send anything. If you cannot confirm a field
from a source document, write Unavailable. Finish with a five-
line summary of what you found.
```

INPUTS

Outlook (M365 connector), Quotes folder.

OUTPUT

Excel tracker plus drafts in Outlook.

REVIEW BEFORE IT LEAVES

Open three rows, confirm the quote numbers and dates against the source email.

MAKE IT RECURRING

Schedule it for Monday at 7:00 AM so it is waiting when you log in.

JOB 2 · PROPOSALS

THE RFP KILL-SHOT CHECK

APRIL · TARA

Before anyone writes a word, know whether we can win and whether anything disqualifies us.

COPY-PASTE PROMPT

```
Read every file in this opportunity folder, including amendments
and Q&A. Act as a federal proposal compliance analyst. Produce
two outputs. First, an Excel compliance matrix named "Compliance
Matrix – [solicitation number]" with one row per requirement in
Sections L and M and the PWS: requirement text, section
reference, page limit or format rule, and a column for which of
our volumes will answer it. Second, a one-page Word memo named
"Kill Shots – [solicitation number]" listing every item that
would get us disqualified: set-aside eligibility, required
certifications we do not hold, NAICS size standard, submission
method, required forms, and due date and time with time zone.
Mark anything you are not certain about as Needs Confirmation. Do
not draft proposal content. Do not estimate anything you cannot
cite to a page.
```

INPUTS

The opportunity folder the new-opportunity skill already built.

OUTPUT

Compliance matrix (Excel) and kill-shot memo (Word).

REVIEW BEFORE IT LEAVES

Check the due date and the set-aside line yourself against the solicitation cover page. Those two errors cost bids.

THE BUILD VARIANCE REPORT

ERIC · STEWART · BRIAN

The week's build data and vendor emails become one exception report the customer never has to ask for.

COPY-PASTE PROMPT

```
Read the BOM Build Tracker board on Monday.com, the Fishbowl
export I saved in this folder as "Fishbowl Export YYYY-MM-
DD.xlsx", and my inbox for vendor emails from the last 7 days.
Act as our VMI program analyst. Build an Excel file named "VMI
Weekly Exceptions YYYY-MM-DD" with one tab per exception type:
builds behind schedule, parts short against the BOM, vendor
deliveries slipped, and open customer questions. Each row needs
the build or part number, the expected date, the actual or new
date, the source (board, export, or email with date), and a
recommended action. Then draft a status email to the customer in
my voice with the three exceptions that matter most and what we
are doing about each. Save to Drafts. Do not send. Do not invent
a date; if a source is silent, write Unavailable.
```

INPUTS

Monday.com connector, a manual Fishbowl export (no live connector yet), Outlook.

OUTPUT

Exception workbook plus a customer status draft.

REVIEW BEFORE IT LEAVES

Confirm every slipped date against the vendor email it cites.

JOB 4 · FINANCE AND ORDER DESK

THE INVOICE AGING NUDGE

Know what is past due by portal, with the collection nudges written before you finish your coffee.

DESI · HEINE

COPY-PASTE PROMPT

```
Pull accounts receivable aging from QuickBooks Online through the
connector. Act as our accounts receivable coordinator. Build an
Excel file named "AR Aging by Portal YYYY-MM-DD" grouped by how
each customer is invoiced (Coupa for WWT, SAP Ariba, WAWF for
government, NetSuite, direct email). For every invoice past its
net terms, list customer, invoice number, amount, days past due,
and the last contact we had about it from my sent mail. Then
draft one polite payment status email per past-due customer in my
voice and save each to Drafts. Do not send. Do not change
anything in QuickBooks. If the connector cannot return a field,
write Unavailable rather than estimating.
```

INPUTS

QuickBooks connector, Outlook.

OUTPUT

Aging workbook by portal plus nudge drafts.

REVIEW BEFORE IT LEAVES

Compare the total past due against the QuickBooks aging summary screen before you send a single nudge.

JOB 5 · HR AND TRAINING

JOB DESCRIPTION TO INTERVIEW KIT

KIM

One approved job description becomes the posting, the screening questions, and the scorecard, in one pass.

COPY-PASTE PROMPT

```
Read the job description in this folder and our company.md and
people.md. Act as our HR program manager. Produce three files.
First, a Word posting named "[Role] Posting" written for LinkedIn
and Indeed in our voice, with our certifications and Great Place
to Work standing stated once. Second, a Word file named "[Role]
Screening Guide" with 10 phone-screen questions tied to the must-
have requirements, each with what a strong answer sounds like.
Third, an Excel scorecard named "[Role] Scorecard" with one row
per requirement and a 1 to 5 scale, ready for interviewers. Use
only facts from the files I gave you. Do not invent salary
ranges, benefits, or start dates; write Unavailable where the job
description is silent.
```

INPUTS

The job description, company.md, people.md.

OUTPUT

Posting, screening guide, scorecard.

REVIEW BEFORE IT LEAVES

The must-have list. If Claude promoted a nice-to-have into a must-have, candidates get screened out wrongly.

JOB 6 · CLIENT SERVICES AND COMPLIANCE

THE CERTIFICATION AND PARTNER CLOCK

KAREN

Never learn about an expiring certification or an unsigned teaming agreement from someone else.

COPY-PASTE PROMPT

```
Read the Certifications and Programs board on Monday.com and the
partners.md file in this project. Act as our compliance and
partner coordinator. Build an Excel file named "Compliance Clock
YYYY-MM-DD" with two tabs. Tab one: every certification and
registration (8(a), SDVOSB, WOSB, WBENC, NMSDC, ISO 9001, CMMC,
state certifications, SAM.gov) with expiration or renewal date,
days remaining, owner, and required documents. Tab two: every
teaming partner with NDA status, teaming agreement status,
signature date, and the last contact date from my sent mail. Flag
anything due within 90 days in the first column. Do not invent a
date; write Unavailable and list it as a gap I need to fill.
```

INPUTS

Monday.com connector, partners.md, Outlook.

OUTPUT

The compliance clock workbook.

REVIEW BEFORE IT LEAVES

The 90-day flags. Open the source record for each one.

MAKE IT RECURRING

The first Monday of every month.

JOB 7 · SALES TEAM

THE OEM EXAM PREP COACH

SALES TEAM

Paste the exact partner course name and get the study plan, topic notes, exam traps, and a practice quiz in one file.

COPY-PASTE PROMPT

```
I am preparing for this partner exam: [paste the exact course or exam name, e.g. Cisco Sales Expert, Dell Technologies Proven Professional, HPE Sales Certified]. I have [N] days. Act as my exam prep coach. Research the current official exam outline and format, citing your sources. If I saved course PDFs in this folder, study from those over the web. Produce one Word file named "Exam Prep – [exam] – YYYY-MM-DD" with: a study plan sized to my days available, one page of salesperson-focused notes per exam topic, a section of common exam traps, and a 20-question pop quiz in the exam's format with the answer key and explanations on the last page. Write Unavailable for any question count, time limit, or passing score you cannot confirm from an official source.
```

INPUTS

The exact course or exam name; course PDFs in the folder if you have them.

OUTPUT

One Word study kit: plan, topic notes, traps, quiz with answer key.

REVIEW BEFORE IT LEAVES

Open two citations and confirm the outline version matches the exam you booked.

FOLLOW-ON PROMPTS

"Quiz me on the questions I missed." "Explain topic 4 like I am pitching it to a customer."

JOB 8 · ENGINEERING

FIELD PHOTOS TO SITE SURVEY REPORT

BLAINE · MICHAEL

A phone full of site photos and a page of scribbled notes becomes the customer-ready survey report the same afternoon.

COPY-PASTE PROMPT

```
Read every photo and the notes file in this folder. Act as our
solutions engineer and site survey lead. Produce a Word file named
"Site Survey Report – [customer] – [site] – YYYY-MM-DD" with these
sections: site summary, area-by-area findings with the matching photo
inserted and captioned, existing infrastructure observed (cable paths,
closets, power, mounting points, ceiling type), constraints and risks,
open questions for the customer, and a preliminary bill of materials
table with part category, quantity observed or estimated, and a column
marking each quantity as Counted or Estimated. Then produce an Excel
file named "Site Survey BOM – [site]" with the same table. Use only
what the photos and notes show. Do not invent a measurement, a part
number, or a price. Write Unavailable where the evidence is missing
and add it to the open questions list.
```

INPUTS

A folder of photos and one notes file (text, Word, or a photo of the handwritten page).

OUTPUT

Survey report (Word) with captioned photos, and the BOM (Excel).

REVIEW BEFORE IT LEAVES

Every quantity marked Counted. Open the photo it cites and count again. Estimated rows go to the customer as estimates, never as counts.

JOB 9 · SALES LEAD

THE RFI PAST PERFORMANCE PULL

APRIL

An RFI lands and the matching past performance is on the page within the hour, with our standing rules already applied.

COPY-PASTE PROMPT

```
Read the RFI or sources sought notice in this folder and our past
performance catalog in company.md. Act as our past performance
curator. Produce a Word file named "PP Match – [notice title] – YYYY-
MM-DD". Section one: the requirement summary in five lines (agency,
scope, NAICS, set-aside if stated, response due date and time with
time zone). Section two: the three to five past performance entries
that match best, ranked, with contract name, customer agency, period
of performance, scope in two sentences, our role (prime or sub), and
why it matches this requirement. Section three: the gaps, meaning
requirements in the notice that none of our past performance covers.
Rules: use only entries whose status is Completed or ongoing
performance; never cite work that is still in proposal. Do not include
customer point-of-contact names, phone numbers, or emails. Do not
include a contract dollar value unless the notice specifically asks
for one. Flag anything you are not certain about as Needs
Confirmation.
```

INPUTS

The notice, company.md past performance catalog.

OUTPUT

The PP match memo (Word).

REVIEW BEFORE IT LEAVES

The status of every cited entry. One In Proposal entry cited as past performance is a credibility loss with that contracting officer.

SAME EVERY TIME

THE FOUR GUARDRAILS

01 DRAFTS ONLY

Claude writes to Drafts. A human presses send. No exceptions.

02 READ EVERYTHING

Rick finds an error in about half of his own Claude outputs. Treat every file as a draft until you have checked it against the source.

03 NEVER LET IT GUESS

Write Unavailable belongs in every prompt. A blank cell is honest. A made-up date is a liability.

04 RIGHT AUDIENCE, RIGHT FILE

Pricing, margin, and salary do not travel to people who should not see them. Name the audience in the prompt and check the file before it goes.

BEFORE NEXT FRIDAY

HOMEWORK

Pick the one job on your slide. Run it once. Bring the output.

- Run the prompt as written. Then change one line to fit your actual work.
- Run your job on Low first. Note whether you had to move to Medium. Tell us next Friday.
- Save the working version as a skill in your Cowork project so you never retype it.
- If it worked, schedule it. If it broke, bring the broken output; that is the best teaching material we have.
- Next Friday: three minutes per person, show the file, tell us what you changed.

Ask Michael for setup help. Ask Rick for prompt help.