

RICK & ISABELLA PIÑA

WEEKLY AI CLASS · 15 MAY 2026

Four Inspired Ways To Work With Claude.

From chatbot to coworker. Practical habits you can use Monday morning.

RICK & ISABELLA PIÑA PATREON

[PATREON.COM/RICKPINA](https://patreon.com/rickpina)

Chatbot.

Generic. Forgetful. One question at a time.

From a chatbot to a coworker who knows your business.

Reads your inbox

Pulls files from OneDrive and Teams.

Knows your customers

Knows your voice, your brand, your style.

Runs multi-step work

While you do something else.

Why this matters for a small team going after big work.

1

SMALL TEAM

Hunting enterprise opportunities with eight people, not eighty.

2

TIME LEVERAGE

Every hour AI takes off your plate is an hour you can spend hunting.

3

COMPOUND ADVANTAGE

Set up your context once. Reap the value every day. The gap widens fast.

The four Inspired ways.

1

PROJECTS

Your AI workspace. Load your context once, work forever.

2

CONNECTORS

Plug Claude into Outlook, OneDrive, Teams, Monday.

3

SKILLS

One-click workflows. Meeting notes, decks, docs.

4

CONTEXT FIRST

The single habit that doubles your output.

01

WAY ONE

Projects: Your AI Workspace.

Load your context once. Every chat starts ready to work.

What goes inside a Project.

1

INSTRUCTIONS

Who you are. How you write. What to always do. What to never do.

2

FILES

Capability statement. Past performance.
Brand guide. Pricing rules.

3

HISTORY

Every chat saved. Pick up where you left off. Context compounds.

Projects you could build this week.

Customer follow-up

Top 10 customers, voice, reply drafts in seconds.

Vendor quotes

Linecard, partner POCs, RFQ responses fast.

Proposal drafts

Capability statement and past performance loaded.

Meeting prep

Attendee bios, recent emails, walk in ready.

Start with ONE. Build it. Use it a week. Then build the next.

02

WAY TWO

Connectors: Plug Claude Into Your Stack.

Stops the copy-paste cycle. Claude reaches everywhere else.

Connect these four this week.

Outlook

“Summarize my unread emails.”

Teams

“What did Karen say about Hill AFB?”

OneDrive / SharePoint

“Find the SOW I sent to WWT.”

Monday.com

“What deals close this month?”

Ask.

Claude reaches everywhere else.

Five prompts to try Monday morning.

Morning triage

“Summarize my unread emails and flag anything from a customer.”

Find that file

“Pull the past performance write-up for Fort Sill.”

Deal check

“What is the status of all my Monday.com deals over \$100K?”

03

WAY THREE

Skills: One-Click Workflows.

Excel macros, but for any task. Press a button, get the output.

Start with these three.

1

MEETING-NOTES

Paste the Otter transcript. Get a branded .docx with attendees, topics, action items.

2

PPTX

Build PowerPoint decks. This deck was made with it.

3

DOCX

Word documents with proper formatting, tables, and styles.

60x.

Faster than typing notes by hand.

One skill replaces an hour.

Paste the transcript

Claude reads it.

Type “create meeting notes”

Formatting, action items, quotes.

Total time

90 seconds, not 60 minutes.

04

WAY FOUR

Context First, Then Ask.

30 seconds of context saves 30 minutes of editing.

Same.

AI. Different answer.

The prompt is the product.

Before

“Write me an email to a customer.” Generic. Useless. Deleted.

After

“Draft a reply to John at WWT confirming the SOW Friday. BLUF. My voice. No em dashes.” Ready to send.

Four questions before you ask.

1

WHO

Audience? Customer, CO, partner, internal? Your AI does not know unless you say.

2

WHAT

Email, summary, deck, analysis? Be precise about the deliverable.

3

WHY

Close the deal? Brief leadership? Stakes drive the tone.

4

HOW

BLUF? Bullets? Table? Length? Format is part of the ask.

West Point DAS quote. All four ways in one job.

1

PROJECT

Brand guide, ADRF spec, AT&T sub data, past performance loaded.

2

CONNECTORS

Carrier memos pulled from Outlook. Datasheets pulled from SharePoint.

3

SKILLS

DOCX skill drafts the technical volume. XLSX skill builds the compliance matrix.

4

CONTEXT

“Write Volume II Section 3.2 for MICC-WP, LPTA, FFP, my voice.”

What NOT to do.

Do not paste sensitive data

No passwords. No customer PII. No FOUO. Ever.

Do not skip the context

If the output is bad, the input was worse.

Do not trust blindly

Verify names, numbers, dates, dollar amounts before sending.

Do not use AI alone for contracts

Legal, pricing, binding language always get a human pass.

Pick one. Use it three times.

1

BUILD A PROJECT

Set up one Project for your role.
Load your context. Use it every
chat.

2

CONNECT OUTLOOK

Connect your inbox. Ask Claude
something useful three times.

3

RUN A SKILL

Try meeting-notes on your next
call. Or docx on your next
memo.

4

CONTEXT FORMULA

Answer WHO / WHAT / WHY /
HOW first. Watch what happens.

CLOSING THOUGHT

AI does not replace people.
It replaces people who do not use AI.

Rick Piña • COO/CRO, Inspired Solutions

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