
Claude.ai Workbook: Beyond the Obvious

A step-by-step companion to the webinar — work through each section in order, or jump to what's relevant to you.

This workbook walks through every tool mentioned in the webinar, in the order it was presented, with the exact steps to set each one up and space to jot down your own notes as you go. There's no need to finish it in one sitting — check off a section, close it, and pick back up later.

1. The Basics

Create your account and send a first message

1. Go to claude.ai and sign up for a free account (an email address is all you need to start).
2. Open a new chat and ask for something small and low-stakes — a short email, a summary of a topic you know well, a list of ideas. The goal is just to get a feel for how it responds.
3. Read the response and notice tone and structure. You can always ask it to redo something shorter, more formal, more casual, etc.

Write one specific, detailed prompt

Vague prompts get vague answers. The fix is naming the goal, the audience, and the format you want, right in the request.

WEAK PROMPT

"Help with my email."

STRONGER PROMPT

"Write a short, friendly email to a client letting them know their project is delayed by one week. Keep it under 100 words and don't over-apologize."

Your turn — write one prompt you want to try this week:

Try the web search toggle

1. Look for the web search toggle in the chat input area and turn it on.
2. Ask something that depends on current information — pricing, news, a current office holder — rather than a settled fact.

Save it for things that actually change over time. Well-known, stable facts don't need it.

2. Connect Your Accounts

This is the single biggest shift most people miss: Claude doesn't have to work only from what you type in. Once you connect an account, Claude can look at what's actually there.

Connect Gmail

1. In Claude, go to Settings → Connectors.
2. Find Gmail under Google Workspace and click Connect.
3. Sign in with your Google account and approve the permissions Google asks for.
4. Back in a chat, just ask about your inbox — Claude detects when it needs the connector.

Good to know: Claude can read your inbox and draft replies for you, but it will never send an email on its own. You always review and hit send yourself. It also only looks when you ask — it isn't watching your inbox in the background.

Connect Google Drive

1. Settings → Connectors → find Google Drive → Connect.
2. Sign in and approve access.
3. Ask Claude to find, summarize, or compare a document by name — no need to open Drive yourself.

Claude can also save files back to Drive, not just read them.

Connect Google Calendar

1. Settings → Connectors → find Google Calendar → Connect.
2. Sign in and approve access.

This one is full read/write — Claude can check your week and also create or move events for you when asked.

Which accounts will you connect first, and why?

3. Try These Prompts This Week

Morning inbox catch-up

TRY THIS PROMPT

"Scan my inbox for anything urgent from the last 48 hours and summarize it."

Find who's waiting on you

TRY THIS PROMPT

"Find every email where someone is waiting on a reply from me, and list them by how long they've been waiting."

Catch up on one person or project

TRY THIS PROMPT

"Pull together everything in my inbox related to [name] so I can catch up before our call."

Chain two or more connectors into one request

This is where connectors really pay off — combine several sources into a single ask instead of checking each one separately.

TRY THIS PROMPT

"Check my calendar for meetings this week, check Gmail for anything urgent, and pull my open action items from Drive — then give me a single priority list."

Write your own version of this prompt, using your real accounts and projects:

4. Build a System, Not Just an Answer

Set up a Project for repeat work

A Project is a dedicated space with its own instructions and reference files, so Claude handles a recurring task the same reliable way every time — instead of you re-explaining yourself from scratch.

1. In Claude, create a new Project and give it a clear name (e.g., “Client Emails” or “Article Drafts”).
2. Add your style guide, templates, or example documents to the Project once.
3. Write brief instructions describing how you want tasks handled inside this Project.
4. Start every future request for that task inside the Project instead of a blank chat.

What's one recurring task you could turn into a Project?

Let Memory carry context forward

Claude can recall relevant details from past conversations automatically, so you're not re-briefing it on who you are and what you're working on every time you open a new chat.

Nothing to set up here — just notice, over time, what it's remembered correctly, and correct anything that's outdated or wrong.

Explore the Connectors Directory

Beyond Google, there's a directory with 50+ integrations — including Slack, Notion, Asana, and WordPress — and new ones are added regularly.

1. Settings → Connectors → Browse Directory.
2. Look for one tool you already use daily.
3. Connect it and try one simple, specific request before doing anything complex.

One tool you use daily that might be worth connecting:

5. Stretch Goals

Feed Claude a document directly

1. Click the plus sign in the chat input and upload a PDF or spreadsheet.
2. Ask for exactly what you need — just the numbers, just the clauses, just the deadlines — rather than a general summary.

Ask for a critique, not just polish

Claude will happily clean up your writing, but it's more useful when you ask it to find the weak spots instead.

TRY THIS PROMPT

“Tell me where this argument is weak, and where a reader would push back.”

Bonus tip: turn articles into action items

Copy or download an article — a newsletter, an industry post, anything you subscribe to — and paste or upload it into Claude. Then ask it to turn the article into a list of actionable items for your business. It's a fast way to get real value out of the newsletters piling up in your inbox instead of just skimming and forgetting them.

1. Copy the article text, or download it as a PDF if that's easier.
2. Paste the text into Claude, or upload the file using the plus sign in the chat input.

3. Ask for a list of specific, actionable items for your business — not just a summary. You can paste or upload just one article, or several at once.

TRY THIS PROMPT

"Here are one or more newsletters I subscribe to. Give me a list of actionable items I could apply to my own business, based on what these articles cover."

One newsletter or publication you could try this with:

Your action plan

Pick one thing from this workbook to actually try this week. Small and specific beats big and vague.

☐ **This week, I will try:**

☐ **By this date:**
