

Claude for Business: Productivity and Automation

Course Code

CLD001

Duration

1 Day

Format

Classroom | Virtual

Overview

This practical, hands-on course enables you to use Claude for research, content creation, task automation, and productivity across Microsoft 365. Through demonstrations and guided exercises, you will learn how to apply Claude confidently in real business scenarios.

Objectives

By the end of this course, you will be able to create effective prompts, analyse documents and data, conduct research using web search and citations, and organise work using Projects, Styles and personalisation features.

You will learn how to delegate tasks to Claude Cowork, use Claude across Microsoft 365 applications, create cross-application workflows, extend Claude with Skills and Connectors, automate routine tasks, and apply responsible AI practices when reviewing and validating AI-generated content.

Content

Lesson 1: Getting Started with Claude

- Understand Claude Chat, Cowork and Microsoft 365 integrations
- Navigate the Claude interface and settings
- Choose the right Claude tools and models for different tasks
- Configure preferences and personalisation features

Lesson 2: Crafting an Effective Prompt

- Apply a structured prompting framework
- Improve results with context, examples and constraints
- Refine outputs through conversation and iteration
- Avoid common prompting mistakes

Lesson 3: Working with Files and Documents

- Upload and analyse documents, spreadsheets, presentations and images
- Compare content and extract insights
- Create summaries, reports and downloadable outputs
- Work with multiple files efficiently

Lesson 4: Web Search & Research in Chat

- Research topics using web search and citations

Who Should Attend

This course is designed for business users who already have access to Claude Pro, Team, or Enterprise and want to use AI more effectively in their day-to-day work

Prerequisites

- Delegates should have an active Claude account.
- For the Microsoft 365 sections ensure you have the Claude add-ins installed for Excel, PowerPoint, Word, and Outlook.

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- Evaluate and validate sources
- Produce research summaries and reports
- Apply effective research techniques

Lesson 5: Projects, Styles and Personalisation

- Create Projects for reusable context
- Build custom instructions and writing styles
- Use preferences and memory effectively
- Manage work across multiple business activities

Lesson 6: Claude Cowork: Delegating Work

- Delegate multi-step tasks to Claude
- Create effective Cowork briefs
- Review, guide and approve outputs
- Manage recurring and scheduled work

Lesson 7: Claude for Microsoft 365

- Analyse data and troubleshoot spreadsheets in Excel
- Create and refine presentations in PowerPoint
- Draft and edit documents in Word
- Manage emails and communications in Outlook

Lesson 8: Cross-App Workflows

- Work across Outlook, Word, Excel and PowerPoint
- Maintain context across applications
- Create connected business workflows
- Apply best practices for multi-app tasks

Lesson 9: Skills, Connectors and Automation

- Extend Claude with Skills and Connectors
- Connect business applications and data sources
- Create reusable workflows
- Automate routine business processes

Lesson 10: Responsible AI and Best Practices

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- Review and validate AI-generated content
- Verify information and sources
- Apply security and privacy best practices
- Understand AI strengths, limitations and risks