

FINISHED EXAMPLE · PREPARED DEMONSTRATION

A project folder becomes a status report, action register and management brief

You practise this in the course

PROJECT

Riverbend client portal rollout (fictional)

PERIOD

September to October

SOURCES

Five files in the project folder

Status report

On track, with one date change: launch moves from 14 to 28 November, as agreed at the steering meeting on 3 October.

Milestone	Date	Status
Pilot complete	26 Sep	Done
Training materials	17 Oct	In progress
Launch	28 Nov (was 14 Nov)	On track

Action register (extract)

Action	Owner	Due	Source
Confirm launch communications	Priya	31 Oct	Steering notes
Book training sessions	Tom	24 Oct	October meeting
Update the risk log	Sam	20 Oct	Actions log

Management brief

Decision needed: approve the revised launch date of 28 November. Main risk: training sessions must be booked by 24 October to keep the new date.

YOU START WITH

A fictional project folder: two sets of meeting notes, a milestones sheet, an actions log and steering notes.

WHAT YOU PRACTISE

Scoping a multi-step task, reviewing Claude's plan at a checkpoint, correcting an assumption and checking the results against the files.

THE PROMPT USED

"Using the files in the Riverbend project folder, produce a one-page status report, an action register (action, owner, due date, source) and a half-page management brief. Show me your plan before you start, and flag any dates you are unsure about."

THE FINISHED OUTPUT CONTAINS

- A status report with milestones and the corrected launch date
- An action register: action, owner, due date and source
- A half-page brief that leads with the decision needed

STILL NEEDS HUMAN CHECKING

- Dates and owners against the source files
- That the corrected date is communicated
- Anything Claude marked as uncertain

RELATED COURSE

[Claude Cowork: Practical Workflows for Business](#) · Module: Working with files and deliverables · Checkpoints, permissions and review

Account note: Cowork needs a paid Claude plan; local folders need the Claude desktop app. On some accounts Cowork appears inside chat, on others as a separate option, and Enterprise organisations enable it centrally.