

Lab 2: Document Creation Workshop

Module: Day 1 - Claude for Business

Duration: 45 minutes

Difficulty: Beginner to Intermediate

Overview

Create real professional deliverables you can use at work tomorrow. Every exercise produces an artifact-based document: emails, summaries, PowerPoint outlines, and Excel assistance.

Objectives

After completing this lab, you will be able to:

- Create A/B test variations for emails and marketing content
- Transform long PDFs into concise executive summaries
- Generate PowerPoint deck outlines from CSV data
- Use Claude in Excel for formula assistance
- Produce professional, copy-paste ready outputs

Prerequisites

- Claude.ai web access
 - Sample files in `/labs/sample-data/lab2/`
 - (Optional) Excel with Claude plugin installed
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Exercise 1: Email A/B Testing (10 min)

Create three versions of the same email for A/B testing different approaches.

Scenario

You're launching a webinar and need to test different email angles to see what drives registrations.

Webinar Details: - Topic: "AI for Non-Technical Leaders: What You Need to Know" - Date: March 15, 2026, 2 PM ET - Audience: VP-level executives at mid-size companies - Goal: 200 registrations

Your Prompt

Ask Claude to create 3 email versions testing different hooks: - Version A: Fear-based (falling behind on AI) - Version B: Opportunity-based (gain competitive advantage) - Version C: Practical-based (actionable tactics you can use Monday)

Your prompt:

Create 3 email versions for A/B testing our webinar registration campaign.

WEBINAR: "AI for Non-Technical Leaders: What You Need to Know"

DATE: March 15, 2026, 2 PM ET

AUDIENCE: VP-level executives at mid-size companies

GOAL: Drive registrations

VERSION A: Fear-based hook

- Lead with risk of falling behind
- Competitor advantage messaging
- FOMO tone

VERSION B: Opportunity-based hook

- Lead with growth/advantage
- "First mover" positioning
- Aspirational tone

VERSION C: Practical-based hook

- Lead with actionable takeaways
- "Use this Monday" messaging
- No-nonsense tone

REQUIREMENTS for each:

- Subject line
- 3-4 paragraph body
- Clear CTA
- ~200 words each

Create as artifact so I can copy/paste to test.

Expected Output

Claude creates artifact with:

VERSION A - Fear-Based

Subject: Your competitors are already using AI - are you?

Body:

While your team debates "if" AI matters, your competitors are already gaining ground...

[etc.]

VERSION B - Opportunity-Based

Subject: The AI advantage your competitors don't have yet

Body:

Join the 12% of executives who've already transformed their operations with AI...

[etc.]

VERSION C - Practical-Based

Subject: 5 AI tactics you can implement this month

Body:

No hype. No theory. Just proven AI strategies you can deploy starting Monday...
[etc.]

Validation: - [] 3 distinct versions with different hooks - [] Each has subject line - [] Each 3-4 paragraphs, ~200 words - [] Clear CTA in each - [] Professional formatting in artifact

Exercise 2: PDF â†’ Executive Summary (15 min)

Upload a long PDF document and create a polished executive summary.

Scenario

Your CEO forwarded a 25-page analyst report on industry trends and needs a summary before tomorrow's board meeting. She needs: key findings, implications for your company, recommended actions.

Sample File

Use: `/labs/sample-data/lab2/Analyst_Report_Q1_2026.pdf`

(Or any PDF report you have - industry report, whitepaper, case study)

Your Prompt

Step 1: Upload the PDF to Claude

Step 2: Use this prompt structure:

```
I've uploaded a [LENGTH]-page [DOCUMENT TYPE]. Create an executive summary for  
  
AUDIENCE: C-suite, reading this before board meeting tomorrow  
  
FORMAT:  
1. Overview (2-3 sentences - what is this document?)  
2. Key Findings (3-4 most important insights)  
3. Implications for Our Company (how does this affect us specifically?)  
4. Recommended Actions (3-5 specific next steps we should take)
```

STYLE:

- Dense with information, zero fluff
- Bullet points for scannability
- Bold key terms for quick visual scanning
- Total length: 1 page maximum

CONTEXT ABOUT OUR COMPANY:

[Add 2-3 sentences about your company/industry to help Claude make relevant connections]

Create as artifact - professional formatting, ready to copy into email.

Expected Output

Professional executive summary artifact:

EXECUTIVE SUMMARY: Q1 2026 Industry Outlook

OVERVIEW

Analyst firm Gartner projects 40% YoY growth in enterprise AI spend through 2026, with SMB adoption accelerating faster than expected (15% â†’ 34% in 12 months).

KEY FINDINGS

â€¢ Enterprise AI budget allocation shifting from "experimental" to "operational" (67% of surveyed companies now have dedicated AI budgets vs. 23% in 2025)

â€¢ **Competitive moat narrowing**: Tools once requiring data science teams are now accessible via no-code platforms - advantage goes to speed of adoption, not technical sophistication

â€¢ ROI expectations maturing: Companies now tracking specific metrics (customer acquisition cost reduction, support ticket deflection) vs. vague "efficiency gains"

â€¢ Privacy and governance becoming purchase blockers: 45% of delayed implementations cite data compliance concerns

IMPLICATIONS FOR OUR COMPANY

â€¢ Our current "wait and see" approach = falling behind: 78% of our market segment has already deployed AI in at least one department

â€¢ Opportunity: Competitors struggling with governance means strong data policies could be competitive differentiator

â€¢ Risk: Our Q4 customer survey cited "not innovative" 3x more than last year - may be AI perception gap

RECOMMENDED ACTIONS

1. ****Immediate**** (next 30 days): Audit current AI usage across departments - likely shadow IT adoption we're not tracking
2. ****Short-term**** (Q1): Pilot 2-3 high-visibility AI use cases with measurable outcomes (suggest: customer support chatbot, sales email automation)
3. ****Strategic****: Form AI governance committee before deploying broadly - ensure compliance as differentiator, not blocker
4. ****Communication****: Update investor/customer messaging to highlight AI adoption progress; perception matters even if capabilities aren't unique yet
5. ****Talent****: Prioritize "AI-curious" in next hiring round - adaptability > technical depth for most roles

Validation: - [] Fits on 1 page - [] Key findings are specific, not generic - [] Implications are tailored to your company/context - [] Actions are specific and time-bound - [] Professional formatting with visual hierarchy

Iterating on the Artifact (Bonus Step)

Now practice editing the artifact in place. Ask Claude to refine the summary: **"Make the recommended actions more specific with timelines"** or **"Make section 2 more concise."** Notice how the artifact updates without starting overâ€”this is the power of iterative refinement.

Exercise 3: CSV Data → PowerPoint Deck Outline (15 min)

Turn data analysis into a presentation deck outline ready for slides.

Scenario

You analyzed quarterly sales data and need to present findings to the sales team. Create a PowerPoint deck outline Claude can help you build.

Sample Data

Use: `/labs/sample-data/lab2/Q1_Sales_Data.csv`

Or use this sample data (copy/paste to Claude):

```
Region,Product,Q1_Revenue,Q1_Units,YoY_Growth,Rep
Northeast,Enterprise,$245000,12,18%,Sarah M
Northeast,Professional,$89000,34,-5%,Sarah M
Southeast,Enterprise,$178000,9,22%,Mike T
Southeast,Professional,$156000,47,8%,Mike T
Midwest,Enterprise,$134000,7,-12%,Jennifer K
Midwest,Professional,$198000,61,15%,Jennifer K
West,Enterprise,$298000,14,25%,David L
West,Professional,$112000,38,3%,David L
```

Your Prompt

```
I've uploaded (or pasted) our Q1 sales data. Create a PowerPoint deck outline for presenting to the sales team.
```

```
GOAL: Celebrate wins, address concerns, align on Q2 strategy
```

```
DECK STRUCTURE (8-10 slides):
```

1. Title slide
2. Exec summary (key numbers)

- 3-5. Data analysis slides (trends, comparisons, standouts)
6. Wins to celebrate
7. Concerns to address
8. Q2 focus areas
9. Q&A

For EACH SLIDE provide:

- Slide title
- 3-5 bullet points (what goes ON the slide)
- Speaker notes (what I'll SAY - conversational, 30-60 seconds)
- Chart/visual suggestion if applicable

AUDIENCE: Sales team (reps + managers)

TONE: Motivational but honest about challenges

Create as artifact - I'll use this to build the actual deck.

Expected Output

Artifact with complete deck outline:

SLIDE 1: Q1 Sales Results Review

â€¢ Performance snapshot

â€¢ Team recognition

â€¢ Agenda overview

SPEAKER NOTES:

"Great work team. Q1 was a strong quarter overall - we're up 12% YoY with some standout performances. Today I'll share what's working, where we have opportunities and how we're positioning for an even stronger Q2. Let's dive in."

[30 seconds]

VISUAL: Photo of team or company logo

SLIDE 2: Q1 By the Numbers

â€¢ Total Revenue: \$1.41M (+12% YoY)

â€¢ Enterprise: \$855K (+13%)

â€¢ Professional: \$555K (+5%)

â€¢ Top region: West (+25%)

SPEAKER NOTES:

"Here's the headline: We crossed \$1.4M for the first time. Enterprise growth accelerating at 13%, Professional steady at 5%. West region absolutely crushed it - David, stand up - 25% growth. That's how it's done."

[45 seconds]

VISUAL: Bar chart comparing Q1 2026 vs Q1 2025 by product line

SLIDE 3: Regional Performance Breakdown

â€¢ West: \$410K (+25%) - David crushing it

â€¢ Northeast: \$334K (+12%) - Sarah strong on Enterprise

â€¢ Southeast: \$334K (+18%) - Mike balanced growth

â€¢ Midwest: \$332K (-3%) - Needs attention

SPEAKER NOTES:

"Three regions showed double-digit growth. Midwest is our focus area - Jennifer not a reflection on you, this is a territory challenge we're solving together. Northeast and Southeast both over \$330K with healthy Enterprise mix. West set the standard at \$410K - David's Enterprise win rate is something we all can learn from."

[60 seconds]

VISUAL: Map with regional numbers or horizontal bar chart

[Continue for slides 4-9...]

Validation: - [] 8-10 slides total - [] Each has title + bullets + speaker notes - [] Speaker notes are conversational (SPEAKABLE, not written language) - [] Visual suggestions for data slides - [] Flows logically (data â†’ insights â†’ actions)

Exercise 4: Claude in Excel - Formula Assistance (5 min)

Use Claude in Excel plugin for quick formula help.

Scenario

You're building a sales dashboard in Excel and need formulas for common calculations.

Tasks (Do 2-3 of these)

Option 1: If you have Claude in Excel plugin installed

1. Open Excel, click Claude in Excel button
2. Ask: "Create a formula to calculate commission: 5% of sales if over \$10,000, otherwise 3%"
3. Ask: "Create a formula to find the top 5 products by revenue"
4. Ask: "Format a pivot table showing sales by month and region"

Option 2: If you DON'T have the plugin

Use Claude.ai chat to get formulas, then copy to Excel:

Prompt:

```
I'm building a sales dashboard in Excel. Give me formulas for:
```

- ```
1. Commission calculation:
 - If sales > $10,000: pay 5% commission
 - If sales <= $10,000: pay 3% commission
 - Cell B2 has the sales amount

2. Extract top 5 products:
 - Column A: Product names (A2:A100)
 - Column B: Revenue (B2:B100)
 - Show top 5 by revenue

3. Running total:
```

- Column C has daily sales
- Column D should show cumulative total
- Starting at row 2

For each: Give me the exact formula, where to put it, and what it does.

## Expected Output

Claude provides:

### 1. COMMISSION FORMULA

Put in cell C2:

```
=IF(B2>10000, B2*0.05, B2*0.03)
```

What it does:

Checks if sales (B2) exceed \$10,000. If yes, multiplies by 5% (0.05).  
If no, multiplies by 3% (0.03).

Copy down the column for all rows.

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### 2. TOP 5 PRODUCTS

If you want a separate list, use this array formula:

```
=SORT(A2:B100, 2, -1)
```

Then take the first 5 rows.

Or use FILTER + LARGE for more control:

```
=FILTER(A2:B100, B2:B100>=LARGE(B2:B100,5))
```

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### 3. RUNNING TOTAL

Put in cell D2:

```
=SUM(C2:C2)
```

What it does:

Sums from the start (\$C\$2 is locked) to current row (C2 updates as you copy down). Creates cumulative total.

Copy formula down column D.

**Validation:** - [ ] Formulas are correct Excel syntax - [ ] Clear explanation of what each does - [ ] Instructions on where to put them - [ ] Can copy/paste directly to Excel

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## Bonus: Combine Everything

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### Ultimate Exercise (If you have extra time)

Create a complete deliverable package combining all skills:

1. **Analyze** the Q1 sales CSV
2. **Create** executive summary (Exercise 2 style)
3. **Generate** PowerPoint deck outline (Exercise 3 style)
4. **Draft** email to team announcing results (Exercise 1 style)

**Prompt:**

I'm presenting Q1 sales results. Help me create a complete deliverable package

DATA: [Paste CSV or upload]

CREATE (as separate artifacts):

1. Executive Summary (1 page)
  - For CEO
  - Key findings, wins, concerns, actions
2. PowerPoint Deck Outline (8-10 slides)
  - For sales team presentation
  - Slide titles, bullets, speaker notes, visual suggestions
3. Team Email (3-4 paragraphs)

- Announce results
- Celebrate top performers
- Set Q2 expectations
- Motivational but honest

For each deliverable:

- Professional formatting
- Action-oriented
- Data-backed insights

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## Key Takeaways

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### Document Creation Best Practices

**For Professional Outputs:** - Always request artifacts ("create as artifact") - Specify format explicitly (bullets, paragraphs, etc.) - Define audience (C-suite vs team vs customers) - Set length constraints (1 page, 200 words, 10 slides)

**For Reusable Templates:** - Save your best prompts - Template pattern: [Goal] + [Format] + [Audience] + [Data] - Reuse monthly/weekly for recurring deliverables

### Artifact Superpowers

âœ… **Formatted** - Professional styling built-in

âœ… **Editable** - Refine inline without re-prompting

âœ… **Portable** - Copy/paste to any tool

âœ… **Iterative** - "Make it more concise" works on artifacts

âœ… **Multi-format** - Markdown, code, tables, documents

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## Troubleshooting

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| Issue                | Solution                                                 |
|----------------------|----------------------------------------------------------|
| Artifact too generic | Add company-specific CONTEXT to prompt                   |
| Wrong formatting     | Specify "create table" or "use bullet points" explicitly |

| Issue                | Solution                                                    |
|----------------------|-------------------------------------------------------------|
| Missing key info     | Ask "What questions do you need answered to complete this?" |
| Too formal/casual    | Add TONE guidance: "conversational", "C-suite formal", etc. |
| No artifact appeared | Say "Create this as an artifact" or "Format as document"    |

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## Summary

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In this lab, you created:

1. **Email variations** - A/B testing for campaigns
2. **Executive summaries** - PDF â†’ 1-page insights
3. **PowerPoint outlines** - Data â†’ presentation deck
4. **Excel formulas** - Claude as spreadsheet assistant

All outputs were artifact-based professional deliverables you can use at work.

## Next Steps

- Save these prompts as templates for recurring tasks
- Build a personal prompt library for common deliverables
- Proceed to wrap-up session

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