

# Top 20 Claude Tasks by Role

---

Copy-paste these prompts. Customize the bracketed text for your situation.

---

## Marketing (5 Tasks)

---

### 1. Campaign Email A/B Testing

```
Create 3 versions of a product launch email for A/B testing.  
Product: [product name and key feature]  
Audience: [target persona]  
Version A: Urgency-driven ("limited time")  
Version B: Value-driven ("here's what you gain")  
Version C: Social proof ("join 5,000+ companies")  
Each: subject line + 3 paragraphs + CTA. ~200 words.
```

### 2. Social Media Content Series

```
Create a 5-post LinkedIn series about [topic].  
Audience: [target title/industry]  
Tone: Professional but conversational  
Each post: Hook (first line grabs attention), 3-4 short paragraphs,  
CTA, 3 relevant hashtags. Mix: 2 insights, 1 story, 1 data-driven, 1 how-to.
```

### 3. Competitor Positioning Analysis

```
I've uploaded [competitor name]'s website copy / marketing materials.  
Create a competitive positioning analysis:  
1. Their key messages (3-5 themes)  
2. Strengths we should acknowledge  
3. Gaps we can exploit
```

4. Recommended counter-positioning for our product  
Format as a one-page brief for our sales team.

## 4. Content Repurposing

I have a [2,000-word blog post / webinar transcript / whitepaper] (attached).  
Repurpose into:

- 3 LinkedIn posts (150-200 words each, different angles)
- 1 email newsletter summary (300 words)
- 5 tweet-length snippets
- 1 executive summary (100 words)

Maintain consistent messaging across all formats.

## 5. A/B Test Variations

Here's our current [landing page headline / email subject / CTA]:  
"[current copy]"

Generate 5 alternative versions testing different psychological approaches:

1. Curiosity gap
2. Specificity (numbers/data)
3. Fear of missing out
4. Benefit-focused
5. Question format

Keep same character length ( $\pm 10\%$ ).

---

## Finance (5 Tasks)

### 1. Budget Variance Analysis

Analyze the attached budget vs. actual data.

For each line item with variance >10%:

- State the variance (\$ and %)
- Provide 2-3 likely explanations
- Suggest whether it needs investigation

Format as a table: Line Item | Budget | Actual | Variance | Explanation  
Flag the top 3 items requiring immediate attention.

## 2. Forecast Narrative

Using the attached quarterly data, write a forecast narrative for [Q2/Q3/Q4].  
Include: Revenue projection with assumptions, key risks (top 3), opportunities (top 3), recommended actions.  
Audience: CFO and board. Tone: Confident but honest about uncertainties.  
One page max. Use specific numbers, not vague language.

## 3. Expense Categorization

I'm pasting [50/100/200] expense line items below.  
Categorize each into: Travel, Software, Consulting, Marketing, Office, Payroll, Other.  
Output as a table with: Description | Amount | Category | Notes  
Flag any items that seem miscategorized or unusual (potential audit items).  
[paste expenses]

## 4. Board Meeting Summary

I've uploaded meeting notes / financial reports for this quarter.  
Create a board-ready executive summary:

1. Financial highlights (3-4 key metrics with YoY comparison)
2. Operational wins (top 3)
3. Risks and mitigations (top 3)
4. Strategic recommendations (2-3)

Format: Professional, scannable, one page. Bold key numbers.  
Our fiscal year runs [month] to [month].

## 5. Financial Model Explanation

Explain this Excel formula in plain English:  
[paste formula]  
Then tell me:  
1. What it calculates  
2. What each part does  
3. Any potential errors or edge cases  
4. A simpler alternative if one exists  
Audience: Finance manager, not a developer.

---

## HR / Operations (5 Tasks)

---

### 1. Job Description Creation

Write a job description for [role title].  
Department: [department]. Reports to: [title].  
Key responsibilities: [3-5 main duties]  
Must-have skills: [3-4 non-negotiable requirements]  
Nice-to-haves: [2-3 preferred qualifications]  
Include: Company overview paragraph, DE&I statement, benefits summary.  
Tone: Professional but warm. Avoid corporate clichés.  
Target length: ~500 words.

### 2. Behavioral Interview Questions

Create 8 behavioral interview questions for a [role title] position.  
Key competencies to assess: [leadership, problem-solving, collaboration, etc.]  
For each question include:  
- The question (STAR format prompt)  
- What good answer looks like (green flags)  
- What concerning answer looks like (red flags)

- Follow-up probe question  
Mix difficulty: 3 standard, 3 intermediate, 2 advanced.

### 3. Policy Draft

Draft a company policy for [remote work / AI usage / expense reimbursement / P  
Company size: [size]. Industry: [industry].  
Include: Purpose, scope (who it applies to), policy details,  
exceptions process, enforcement, effective date.  
Tone: Clear and direct, not legalistic.  
Flag any areas where I should consult legal counsel.  
One page preferred, two pages max.

### 4. Process Documentation

I'm going to describe a process step by step. Turn it into  
professional process documentation.  
Process: [name]  
Owner: [role]  
Frequency: [daily/weekly/monthly]  
Include: Purpose, prerequisites, numbered steps, decision points,  
escalation path, common issues + solutions.  
Format for a wiki/knowledge base (headers, bullets, clean structure).

### 5. Onboarding Checklist

Create a 90-day onboarding checklist for a new [role title] in [department].  
Structure as:  
- Pre-start (before Day 1): IT setup, accounts, welcome email  
- Week 1: Orientation, key meetings, system access  
- Month 1: Training, first projects, mentor check-ins  
- Month 2-3: Increasing responsibility, goals, feedback  
Include specific action items with responsible person for each.  
Format as a table: Timeline | Task | Owner | Status checkbox.

---

# Sales (5 Tasks)

---

## 1. Discovery Call Summary

Here are my notes from a discovery call with [company name]:  
[paste raw notes]

Create a structured summary:

1. Company overview (size, industry, current tools)
2. Pain points identified (ranked by severity)
3. Buying signals detected
4. Potential objections to address
5. Recommended next steps with timeline
6. Qualification score: Hot / Warm / Cold with reasoning

Format for CRM entry.

## 2. Proposal Draft

Draft a proposal for [company name] based on this context:

Problem: [their pain point]

Our solution: [product/service]

Scope: [what we'd deliver]

Timeline: [implementation period]

Investment: [price range or TBD]

Include: Executive summary, problem statement, proposed solution, implementation plan, expected outcomes with metrics, investment, next steps.

Tone: Confident, specific, focused on their ROI. 2-3 pages max.

## 3. Objection Handling Scripts

Our top 5 sales objections are:

1. "[objection 1 - e.g., too expensive]"
2. "[objection 2 - e.g., we already have a solution]"
3. "[objection 3 - e.g., not the right time]"
4. "[objection 4 - e.g., need to check with my team]"

5. "[objection 5 - e.g., can you prove ROI?]"

For each, provide:

- Acknowledge statement (empathy first)
- Reframe (shift perspective)
- Evidence (proof point or story)
- Bridge back to value
- Closing question

## 4. Follow-Up Email Sequences

Create a 4-email follow-up sequence for a prospect who [attended demo / downloaded whitepaper / went quiet after proposal].

Contact: [title] at [company type]

Our product: [brief description]

Email 1 (Day 1): [immediate follow-up]

Email 2 (Day 3): [value add - share relevant resource]

Email 3 (Day 7): [social proof / case study reference]

Email 4 (Day 14): [final attempt / create urgency]

Each email: Subject line, 2-3 paragraphs, clear CTA. Professional tone.

## 5. Pipeline Analysis

I've attached our current pipeline data.

Analyze and provide:

1. Win probability assessment for top 10 deals (with reasoning)
2. Deals at risk of stalling (identify warning signs)
3. Revenue forecast for [this quarter] with confidence levels
4. Top 3 actions to accelerate pipeline
5. Deals to deprioritize (and why)

Format as executive summary for sales leadership meeting.

Include specific deal names and dollar amounts.

---

# How to Use These Prompts

---

1. **Copy the prompt** that matches your task
2. **Replace bracketed text** with your specifics
3. **Attach files** when the prompt references data
4. **Iterate:** If the first output isn't perfect, refine ("make it more concise" / "add specific numbers")

**Pro tip:** Save your best customized prompts in a Claude Project for instant reuse.

---

Â© 2026 AIA Copilot â€” Top 20 Claude Tasks by Role