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

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

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Exercise 2: PDF → 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 con


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 202
with SMB adoption accelerating faster than expected (15% → 34% in 12 months).


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

• **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

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

• Privacy and governance becoming purchase blockers: 45% of delayed implementat
  cite data compliance concerns


IMPLICATIONS FOR OUR COMPANY
```

```
• Our current "wait and see" approach = falling behind: 78% of our market segme
  has already deployed AI in at least one department

• Opportunity: Competitors struggling with governance means strong data policie
  could be competitive differentiator

• Risk: Our Q4 customer survey cited "not innovative" 3× 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
   (suggest: customer support chatbot, sales email automation)

3. **Strategic**: Form AI governance committee before deploying broadly -
   compliance as differentiator, not blocker

4. **Communication**: Update investor/customer messaging to highlight AI adopti
   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 over—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
• Performance snapshot
• Team recognition
• 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 opportuni
and how we're positioning for an even stronger Q2. Let's dive in."
[30 seconds]

VISUAL: Photo of team or company logo

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SLIDE 2: Q1 By the Numbers
```

```
• Total Revenue: $1.41M (+12% YoY)
• Enterprise: $855K (+13%)
• Professional: $555K (+5%)
• 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


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SLIDE 3: Regional Performance Breakdown
• West: $410K (+25%) - David crushing it
• Northeast: $334K (+12%) - Sarah strong on Enterprise
• Southeast: $334K (+18%) - Mike balanced growth
• 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 lea
[60 seconds]


VISUAL: Map with regional numbers or horizontal bar chart


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[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 → insights → 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.


---


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))


---


3. RUNNING TOTAL
Put in cell D2:
=SUM($C$2: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

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
```

Key Takeaways

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

☐**Formatted** - Professional styling built-in
☐**Editable** - Refine inline without re-prompting
☐**Portable** - Copy/paste to any tool
☐**Iterative** - "Make it more concise" works on artifacts
☐**Multi-format** - Markdown, code, tables, documents

Troubleshooting

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"

Summary

In this lab, you created:

1. **Email variations** - A/B testing for campaigns
2. **Executive summaries** - PDF → 1-page insights
3. **PowerPoint outlines** - Data → 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