

# Lab 1: Practical Prompting & Document Creation

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**Module:** Day 1 - Claude for Business

**Duration:** 45 minutes

**Difficulty:** Beginner

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## Overview

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In this lab, you'll practice effective prompting and create real professional documents using Claude's artifact feature. Every exercise produces a deliverable you can use at work.

## Objectives

After completing this lab, you will be able to:

- Transform vague prompts into effective ones using GOLDEN framework
- Create professional reports from data
- Generate presentation outlines with speaker notes
- Analyze PDF documents and create executive summaries
- Use artifacts to get copy-paste ready outputs

## Prerequisites

- Access to Claude.ai (web interface)
  - Sample files provided in `/labs/sample-data/`
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## Exercise 1: GOLDEN Framework Practice (10 min)

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Transform three vague prompts into effective ones using the GOLDEN framework.

**GOLDEN Framework:** - Goal - What you want to achieve - Output format - How you want the result - Length - How much detail - Details - Context Claude needs - Examples - Show what good looks like - Notes - Constraints, tone, audience

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## Prompt 1: Too Vague

**Original (Bad):**

Help me with marketing.

**Your Task:** Rewrite using GOLDEN framework for a social media campaign.

**Space for your answer:**

[Write your improved prompt here]

**Suggested Answer:**

**GOAL:** Create a 30-day social media campaign for our new CRM product

**OUTPUT:** Campaign calendar with daily post ideas

**LENGTH:** 30 posts total (mix of LinkedIn, Twitter)

**DETAILS:**

- Product: Cloud CRM for small businesses
- Target audience: Solo entrepreneurs, 1-10 person companies
- Key benefits: Easy setup, affordable (\$29/month), integrates with tools they

**EXAMPLES:**

- Post idea: "Stop losing leads in your inbox. [Product] turns every email into..."
- Post idea: Customer success story with revenue growth stat

**NOTES:**

- Professional but friendly tone
- Focus on pain points (lost leads, messy spreadsheets, missed follow-ups)
- Include mix of educational, promotional, customer stories

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## Prompt 2: Email Response

**Original (Bad):**

Write an email declining the request.

**Your Task:** Rewrite for declining a vendor proposal professionally.

**Your improved prompt:**

[Write it here]

**Suggested Answer:**

**GOAL:** Decline vendor proposal while maintaining good relationship

**OUTPUT:** Professional email (3-4 paragraphs)

**LENGTH:** ~200 words

**DETAILS:**

- Vendor: Proposing \$50K software solution
- Reason for decline: Budget allocated elsewhere this year
- Want to keep door open for future
- Appreciated their thorough proposal

**NOTES:**

- Warm but firm
- Thank them for their time
- Offer to reconnect next budget cycle

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### Prompt 3: Report Request

**Original (Bad):**

Analyze the data.

**Your Task:** Rewrite for quarterly sales analysis.

**Your improved prompt:**

[Write it here]

**Suggested Answer:**

**GOAL:** Analyze Q4 sales data and identify trends

**OUTPUT:** Executive summary with bullet points and 2-3 charts

**LENGTH:** 1 page summary + visualizations

**DETAILS:**

- Data: Q4 sales by region, product, rep
- Looking for: Growth areas, declining products, top performers
- Context: Down 5% overall, need to understand why

**EXAMPLES:**

- "Northeast region up 12% driven by Enterprise deals"

- "Product X declining 20% - investigate support ticket volume"

NOTES:

- Audience: Executive team
- Action-oriented recommendations
- Flag risks and opportunities

## Exercise 2: Create Professional Report (15 min)

Use Claude to create a formatted business report from sample data.

### Scenario

You're a product manager presenting monthly metrics to leadership. Use the sample data to create a professional report.

### Sample Data (Copy/Paste to Claude)

#### Monthly Product Metrics - January 2026

Active Users: 15,234 (+8% vs December)

New Signups: 1,892 (+12%)

Churn Rate: 2.3% (-0.4%)

Average Session Time: 18.5 minutes (+2.1 min)

#### Feature Adoption:

- New Dashboard: 67% of active users
- Reporting Module: 34%
- API Access: 12%

Support Tickets: 342 (+15%)

- Bug reports: 89
- Feature requests: 156
- How-to questions: 97

Revenue: \$287,400 (+ 9%)

ARPU: \$18.87 (+ \$0.50)

## Your Prompt

Write a prompt that creates an artifact-based report with:

- Executive summary
- Key metrics with trend interpretation
- Wins to celebrate
- Concerns to address
- Recommended actions

**Your prompt:**

[Write your prompt here - include GOLDEN elements]

## Expected Output

Claude should create an artifact (the  icon appears) with a formatted report you can copy and use.

**Validation:** Does your artifact include:

- [ ] Clear executive summary
- [ ] Metrics with % changes highlighted
- [ ] 2-3 wins identified
- [ ] 1-2 concerns flagged
- [ ] 3-5 action items

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## Exercise 3: Presentation Outline with Speaker Notes (10 min)

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Create a presentation outline for an upcoming stakeholder meeting.

## Scenario

You need to present the Q1 budget proposal to department heads. Create a slide outline with speaker notes.

## Your Prompt

Ask Claude to create: - 8-10 slide titles - 2-3 bullet points per slide - Speaker notes for each slide (what to SAY, not just what's on screen) - Time allocation per section

**Topic:** Q1 Budget Proposal - \$500K request for new CRM implementation

**Your prompt:**

[Write your GOLDEN-structured prompt here]

## Expected Output

Claude creates artifact with:

Slide 1: Budget Proposal Overview

- Requesting: \$500K for CRM implementation
- Timeline: Q1-Q2 2026
- Expected ROI: 3:1 within 18 months

SPEAKER NOTES:

"Good morning team. I'm requesting \$500K to implement a modern CRM system. This replaces our current patchwork of spreadsheets and siloed databases. I'll show you the business case, implementation plan, and ROI projections." [2 minutes]

Slide 2: Current State Problems

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**Validation:** - [ ] 8-10 slides with clear titles - [ ] Bullet points are concise - [ ] Speaker notes are in conversational language (speakable) - [ ] Time allocations add up to ~30 minutes

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## Exercise 4: PDF Analysis & Executive Summary (10 min)

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Upload a PDF and create an executive summary.

### Scenario

Your boss sent you a 12-page industry report and needs a 1-page summary by end of day.

### Sample File

Use: `/labs/sample-data/Industry_Report_2026.pdf` (or any multi-page PDF you have)

### Your Prompt

Ask Claude to: 1. Read the uploaded PDF 2. Create a 1-page executive summary 3. Format: 3-4 paragraphs + 5 key takeaways 4. Highlight actionable insights

### Your prompt:

[Attach PDF first, then write your prompt]

## Suggested Prompt Structure:

I've uploaded a 12-page industry report. Create a 1-page executive summary for

### FORMAT:

- Overview paragraph (what the report covers)
- Key findings (2-3 paragraphs)
- Top 5 takeaways (bullet points)
- Recommended actions for our company (2-3 specific items)

AUDIENCE: C-suite executives with 5 minutes to read

FOCUS: Competitive threats and market opportunities most relevant to us

## Expected Output

Claude analyzes the PDF and creates an artifact with:  
- Clean, professional formatting  
- Dense with information but scannable  
- Action-oriented recommendations  
- No fluff or filler

**Validation:** - [ ] Fits on 1 page - [ ] 5 bullet-point takeaways - [ ] 2-3 actionable recommendations - [ ] Uses professional business language

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## Bonus Exercise (If Time Allows)

### Create a Process Document

Document a process you do regularly (weekly report, monthly close, etc.) by having Claude interview you.

#### Prompt:

I want to document my weekly sales report process so I can delegate it.

Ask me questions to understand the process step-by-step, then create:

1. Process overview
2. Step-by-step checklist

3. Tips and gotchas
4. Sample output template

Start by asking me your first question about what triggers this process.

Let Claude interview you, answer its questions, then it will create a comprehensive process document.

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## Key Takeaways

### What Makes Prompts Effective

- âœ... **Specific** - Clear goal, not vague requests
- âœ... **Contextualized** - Background info Claude needs
- âœ... **Formatted** - Specify desired output structure
- âœ... **Constrained** - Length, tone, audience
- âœ... **Examples** - Show what "good" looks like when possible

### GOLDEN Framework Recap

Element	What to Include
Goal	What you want to achieve
Output	Format (report, email, list, etc.)
Length	How much detail (1 page, 5 bullets, etc.)
Details	Context, background, data
Examples	Samples of desired output
Notes	Tone, audience, constraints

## Artifacts = Professional Outputs

When Claude creates an artifact (ðŸ“„ icon): - It's formatted and ready to use - You can copy/paste directly - You can edit in-place and iterate - Perfect for reports, documents, code, data

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## Troubleshooting

Issue	Solution
Output too generic	Add more DETAILS - Claude needs context
Wrong format	Specify OUTPUT format clearly ("create table", "bullet points", etc.)
Too long/short	Set LENGTH explicitly ("1 page max", "5 sentences")
Not professional enough	Add NOTES about audience and tone
Artifact didn't appear	Ask "Create this as an artifact" or "Format this as a document"

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## Summary

In this lab, you practiced:

1. **GOLDEN Framework** - Structure for effective prompts
2. **Report Creation** - Turn data into professional documents
3. **Presentation Outlines** - Slide structure with speaker notes
4. **PDF Analysis** - Extract insights and create summaries
5. **Artifacts** - Get copy-paste ready professional outputs

## Next Steps

- Save your best prompts as templates
- Try these techniques on real work tasks

- Proceed to afternoon session: Claude in Excel
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