

Claude AI & Cowork

The L&D Professional's Complete Guide

From First Login to Real-World Results

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Part 1: What Is Claude (and Why Should L&D Care)?

Claude is Anthropic's AI assistant, available through web, mobile, desktop, and API. If you've used ChatGPT or Gemini, Claude occupies the same space but with a few distinctions that matter for L&D professionals: it excels at long-form writing, nuanced analysis, and following complex instructions. It's also built with a strong safety-first philosophy, which matters when you're creating content for compliance training or handling sensitive employee data.

What makes Claude particularly relevant for our field in 2026 is **Cowork**, a mode inside the Claude Desktop app that turns Claude from a chatbot into an autonomous digital coworker. Instead of going back and forth with prompts, you describe an outcome, step away, and come back to finished work: formatted Word documents, slide decks, analyzed spreadsheets, organized research, and more.

Cowork launched in January 2026, first for Max subscribers, then expanded to all Pro users by January 16. It uses the same agentic architecture that powers Claude Code (Anthropic's developer tool) but wraps it in an interface designed for knowledge workers, not engineers.

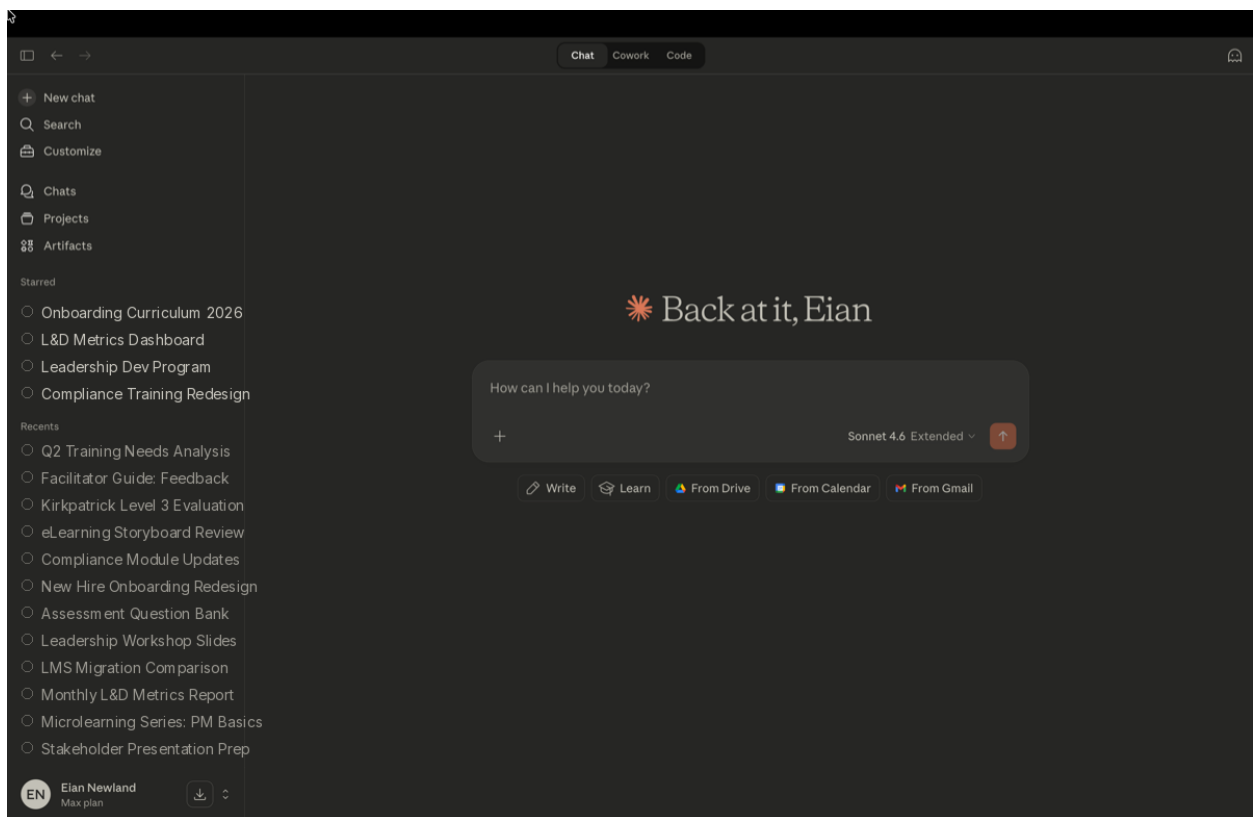


Figure 1: The Claude interface. (1) Sidebar with conversations and navigation, (2) main chat area, (3) message input bar, (4) model selector and quick actions.

What Makes Claude Different from ChatGPT and Gemini

Three things stand out for L&D work specifically:

- **Long, structured output quality.** Claude consistently produces better first drafts of training documents, facilitator guides, and assessment rubrics compared to competitors. Its instruction-following on complex formatting requests ("create a 12-module curriculum outline with Bloom's taxonomy verbs at each level") is notably reliable.
- **200K to 1M token context windows.** You can paste an entire employee handbook, a full set of course evaluations, or a 300-page compliance manual and ask Claude to work with all of it at once. The Opus model supports up to 1 million tokens, roughly 700,000 words.
- **Cowork's autonomous execution.** This is the differentiator. Claude doesn't just suggest edits to your PowerPoint; it opens the file, makes the changes, saves it, and hands you the finished product. No other major AI assistant does this natively at this level of polish as of March 2026.

Try This Now (Chat Mode):

"I'm an L&D professional designing a 90-minute workshop on active listening for frontline managers. Give me 5 learning objectives using Bloom's taxonomy at the Application level, a timed agenda, and 2 interactive activities that work in a virtual setting."

Paste this into any Claude plan to see the quality of output firsthand. No setup required.

Part 2: Choosing Your Plan

Claude offers tiered plans. For L&D professionals who want Cowork, the Pro plan at \$20/month is the entry point. Here's the full breakdown:

Plan	Price	Cowork Access	Best For
Free	\$0	No	Trying Claude for the first time. Basic drafting, Q&A, brainstorming. ~30-100 messages/day.
Pro	\$20/mo	Yes	Individual L&D professionals. File creation, extended thinking, web search, connectors. ~45 msgs/5 hrs.
Max 5x	\$100/mo	Yes	Heavy daily users. 5x Pro usage limits. Persistent memory across conversations.
Max 20x	\$200/mo	Yes	Power users and developers. 20x Pro usage. Early access to new features.
Team	\$25-30/user/mo	Yes	L&D teams of 5+. Shared projects, admin controls, higher limits.
Enterprise	Custom	Yes	Organizations needing SSO, audit logging, compliance APIs, SCIM.

Recommendation for L&D Professionals

Start with the Free plan for a week to test Claude's writing and analysis quality. If you find yourself using it daily, upgrade to Pro (\$20/month) to unlock Cowork, file creation, extended thinking, and MCP connectors. The Pro plan is the sweet spot for most individual practitioners. If you're leading an L&D team, the Team plan at \$25-30/user adds shared projects and admin controls.

Part 3: The Three Models and When to Use Each

Claude isn't a single model. It's a family of three, each optimized for different work. Choosing the right one for each task saves time and (on API plans) money. On consumer plans, Cowork defaults to Opus 4.6, while regular chat lets you switch between models.

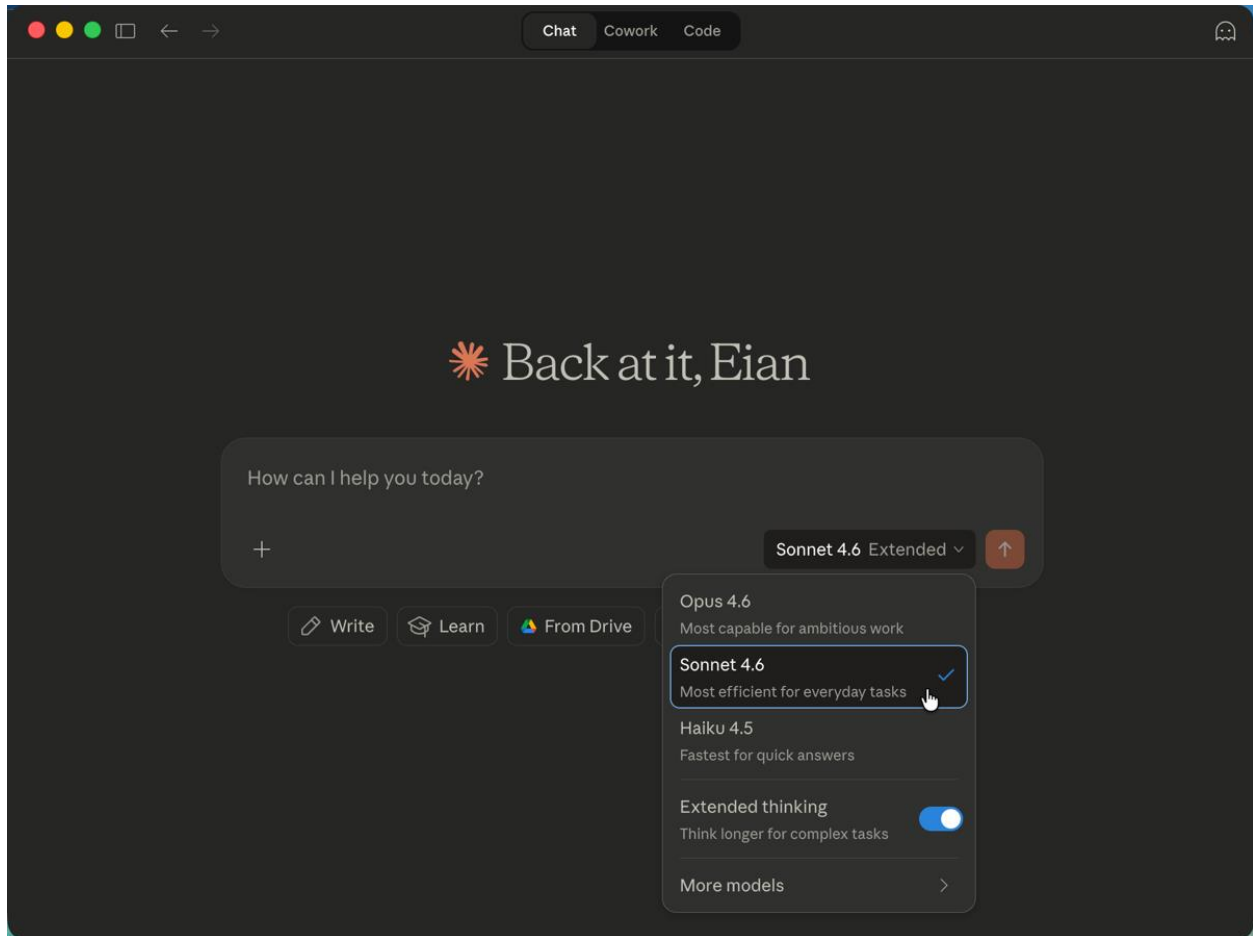


Figure 2: The model selector. Click the model's name below the input bar to switch between Opus 4.6, Sonnet 4.6, and Haiku 4.5 at any time.

Claude Opus 4.6 (The Strategic Thinker)

Released February 5, 2026. This is Anthropic's most capable model, the one that powers Cowork. It has a context window of up to 1 million tokens, meaning it can hold roughly 700,000 words in its working memory at once.

What it's best at for L&D:

- Analyzing an entire training program end-to-end and identifying gaps
- Writing comprehensive curriculum designs with multiple interconnected modules
- Processing large documents (full compliance manuals, lengthy evaluation data sets)
- Multi-step autonomous tasks in Cowork (creating a full slide deck from a brief)

- Complex Kirkpatrick Level 3-4 evaluation design with multiple data source synthesis

Think of Opus as your senior instructional designer who can hold the entire project in their head.

Claude Sonnet 4.6 (The Everyday Workhorse)

Released February 17, 2026. Sonnet is the model most people should use for daily work. It delivers near-Opus quality at lower cost and faster speed. In developer benchmarks, 70% of evaluators preferred Sonnet 4.6 over its predecessor, and 59% preferred it over the previous Opus model.

What it's best at for L&D:

- Drafting individual training modules, job aids, and quick-reference guides
- Writing assessment questions and rubrics
- Email and communication drafting (stakeholder updates, learner notifications)
- Editing and proofreading existing training content
- Creating discussion guides and facilitator notes

Sonnet is your reliable instructional designer who cranks out quality work fast.

Claude Haiku 4.5 (The Speed Specialist)

Released October 2025. Haiku is 2x faster than Sonnet 4 and costs one-third as much on API plans. It matches Sonnet 4's intelligence level despite being the "smallest" model.

What it's best at for L&D:

- Quick text cleanup and formatting
- Generating metadata and tagging for learning content
- Simple Q&A about training policies or procedures
- Batch processing (renaming files, reformatting lists, extracting key terms)
- Answering routine learner questions in chatbot-style applications

Haiku is your L&D coordinator who handles the quick tasks so you can focus on strategy.

Feature	Opus 4.6	Sonnet 4.6	Haiku 4.5
Context Window	Up to 1M tokens	200K (1M beta)	200K tokens
Speed	Slowest	Medium	Fastest (2x Sonnet 4)
API Cost (input/output)	\$5/\$25 per M tokens	\$3/\$15 per M tokens	\$1/\$5 per M tokens
Extended Thinking	Yes	Yes	Yes

Best L&D Use	Strategy, full program design, large document analysis	Daily content creation, editing, assessments	Quick tasks, tagging, formatting, batch work
Powers Cowork	Yes (default)	Yes	Yes

Part 4: Setting Up Claude Desktop + Cowork

Step 1: Create Your Account

1. Go to claude.ai and click Sign Up.
2. Create an account with your email, Google, or Apple login.
3. Start with the Free plan to explore, or go directly to Pro (\$20/month) if you already know you want Cowork.

Step 2: Download the Desktop App

1. Visit claude.com/download and download for macOS or Windows.
2. Install and launch the app. Sign in with your account credentials.
3. You'll see three tabs at the top of the interface: Chat, Cowork, and Code. Chat is your standard conversation mode. Cowork is where autonomous task execution happens.

Step 3: Configure Cowork

Once you're on a Pro plan or above:

1. **Click the Cowork tab** at the top of the desktop app.
2. **Select a folder.** Cowork will ask you to choose a folder on your computer that it can access. This is the folder where Claude will read, edit, and create files. Choose a project folder or create a new one (e.g., "Claude L&D Projects").
3. **Set global instructions (optional but recommended).** Go to Settings and add standing instructions that apply to every Cowork session. For L&D professionals, a good starting point: "I'm an L&D professional. Default to professional tone. When creating training content, use Bloom's taxonomy for learning objectives. Format documents for immediate use without manual cleanup."
4. **Install connectors (optional).** Claude can connect to Google Drive, Gmail, Google Calendar, Notion, and more through MCP (Model Context Protocol) connectors. These let Claude read your existing files and integrate with your workflow.

Folder Strategy for L&D Work

Create a folder structure like: /Claude L&D Projects/Curriculum Design, /Assessments, /Compliance, /Facilitator Guides, /Research. When you start a Cowork session, point Claude at the relevant subfolder. This keeps outputs organized and gives Claude context from related files in the same directory.

Part 5: Settings, Capabilities, and the Customize Menu

Before diving into features, take five minutes to configure Claude's Settings. These controls determine what Claude can and cannot do in your sessions. You'll find them by clicking the gear icon in the sidebar of Claude Desktop.

Settings Overview

Claude Desktop organizes configuration into several sections. Here's what each one does and why it matters for L&D work.

General

Theme (light/dark), language preferences, and your account details. Also where you manage your subscription plan. If you're on Free and want Cowork access, this is where you upgrade to Pro.

Capabilities

This is the most important settings screen for new users. Capabilities controls what Claude is allowed to do during your sessions:

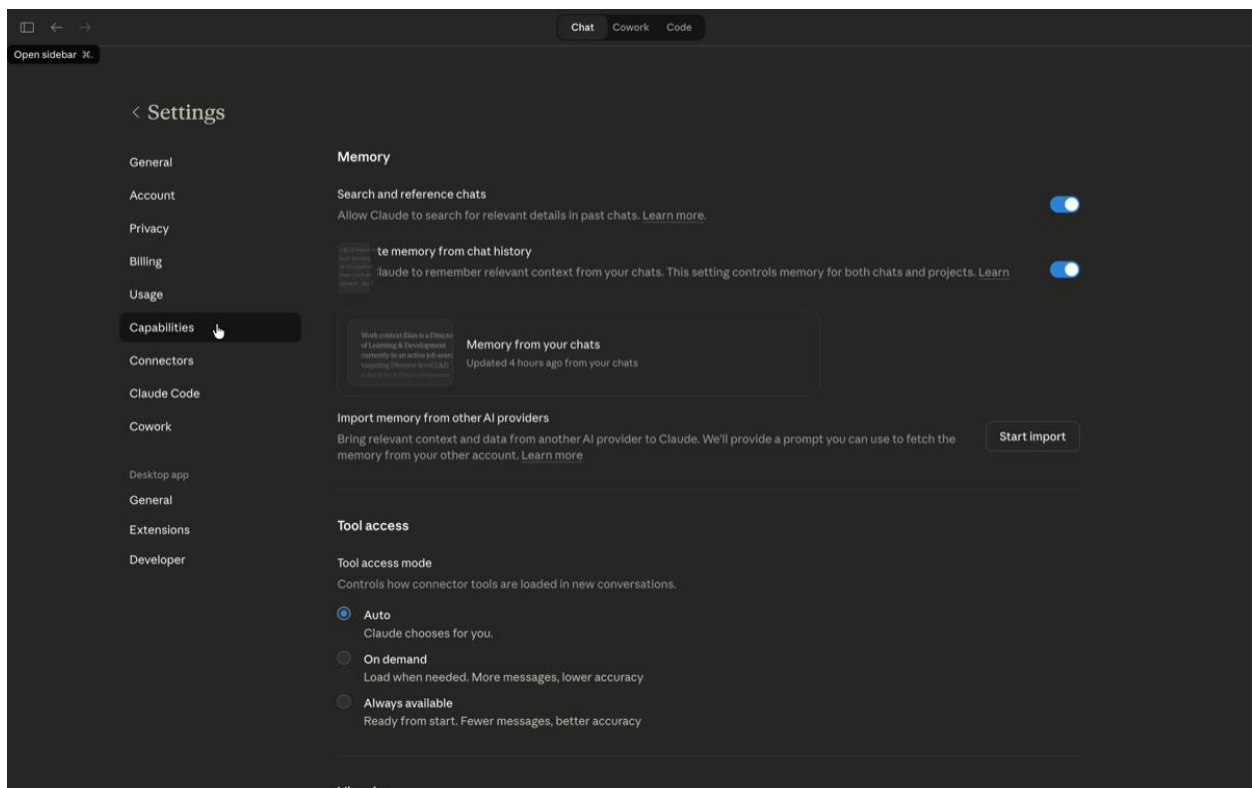


Figure 3: The Capabilities settings screen. Toggle each capability on or off based on your workflow needs. All five are recommended for full L&D functionality.

- **Code Execution:** Enables Claude to run Python scripts, process data, generate charts, and create files like Word documents and presentations. This must be turned on for Cowork to function. Without it, Claude can only have text conversations. For L&D work, this is essential because it powers document creation, data analysis, and most of the practical scenarios in this guide.
- **Web Search:** Allows Claude to search the internet in real time. Turn this on for research tasks, benchmarking, finding current industry trends, or pulling salary data for job descriptions. Turn it off if you're working with sensitive internal content and want to ensure that Claude uses only what you provide.
- **Analysis Tool:** Let Claude create interactive visualizations, run calculations, and generate charts directly in conversations. Useful for analyzing training evaluation data, creating dashboards, or processing survey results.
- **LaTeX Rendering:** Displays mathematical equations with proper formatting. Generally, not critical for L&D unless you're developing technical or scientific training content.
- **Internet Access (Cowork):** Separate from web search in Chat, this controls whether Cowork sessions can access the internet. Enable this for any task that requires research, fetching content, or connecting to web-based tools.

Recommended Starting Configuration for L&D

Turn on Code Execution, Web Search, Analysis Tool, and Internet Access. Leave LaTeX Rendering off unless needed. This gives Claude full capability for the document creation, research, and data analysis tasks that make up most L&D work. You can always toggle capabilities off for specific sessions where you want tighter control.

Connectors

Browse and enable MCP (Model Context Protocol) connectors that let Claude interact with external services. Google Drive, Gmail, Google Calendar, Notion, Outlook, Slack, Asana, Jira, and dozens more are available. Each connector requires you to authenticate (sign in to that service) and grant specific permissions. See Part 13 for detailed connector setup.

Usage

Monitor your consumption. Cowork sessions use significantly more tokens (the units AI processes) than standard chat, so this screen helps you track how much of your plan allocation you've used. Pro plans have generous limits, but heavy Cowork usage can consume them faster than expected.

The Customize Menu

The Customize section (accessible from Settings or the sidebar) is where you manage three categories of extensions:

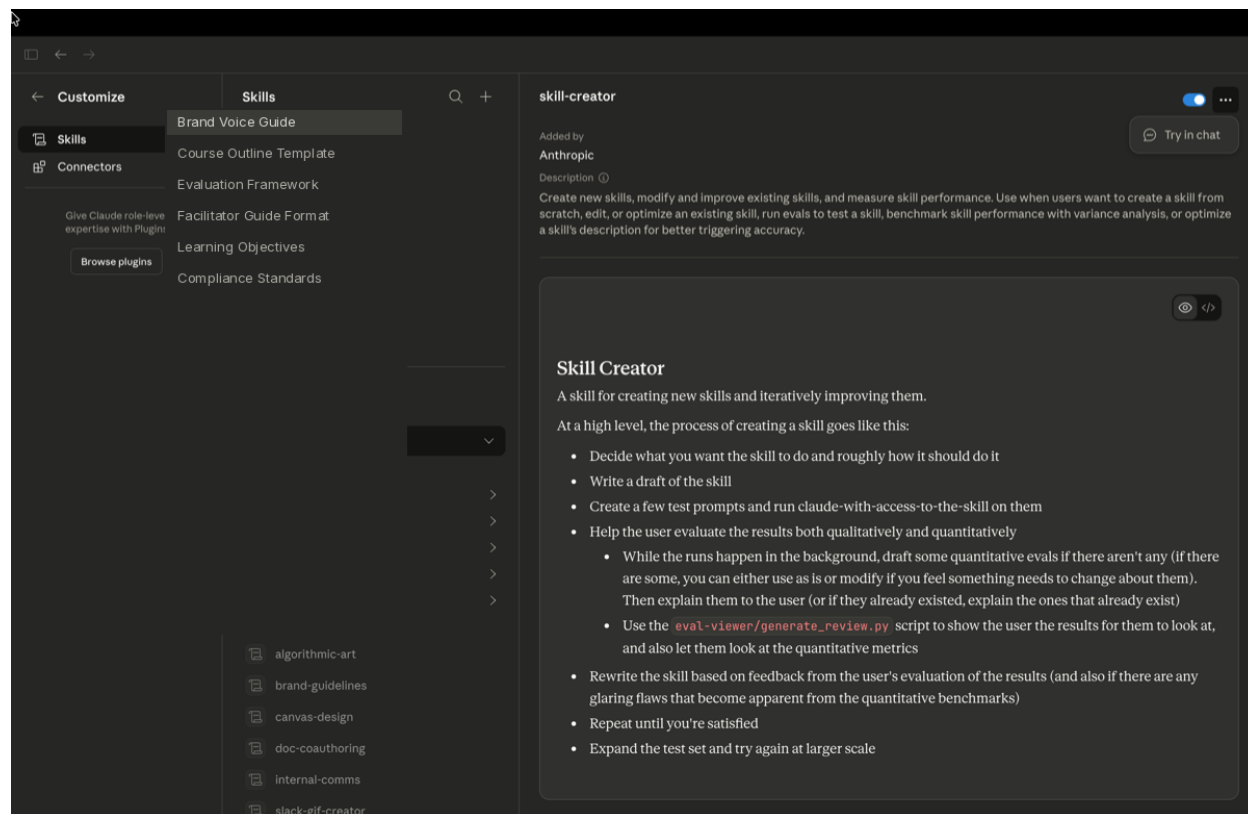


Figure 4: The Customize menu showing Skills, Plugins, and Connectors sections. Toggle individual items on or off to control what Claude can access.

1. Skills

Skills are reusable instruction sets that teach Claude how to handle specific types of tasks. Think of them as specialized playbooks. Claude comes with several built-in skills for document creation (Word, PowerPoint, Excel, PDF), and you can install custom skills for things like brand voice, specific frameworks, or company-specific workflows. Skills are covered in depth in Part 9.

2. Plugins

Plugins are installable packages that bundle skills, connectors, and tools together. Anthropic released 11 open-source plugins at launch in January 2026, and the ecosystem is growing through community contributions and a plugin marketplace. Plugins are installed the same way as skills but provide more comprehensive functionality.

3. Connectors

A quick-access view of your enabled MCP connectors (the same ones available in Settings), with the ability to browse new ones and manage permissions.

Permission Levels in Cowork

When Cowork uses connectors or performs actions, it respects the permission settings you configure. For each connector, you can set how often Claude asks for approval:

- **Always ask:** Claude pauses and asks permission before every action. Best for sensitive operations, such as sending emails.
- **Ask for new actions:** Claude asks for new actions the first time it performs a new type of action, then remembers your approval for that session. Good balance for most L&D work.
- **Don't ask:** Claude acts autonomously. Use this for read-only operations, such as searching Google Drive or reading calendar events, where there's no risk of unintended changes.

Security Note

Claude runs Cowork tasks in a secure sandboxed virtual machine on your computer. It can only access the folder you've explicitly selected. It cannot see your Desktop, Documents, or other folders unless you grant access. No data has persisted between sessions in the sandbox. This isolation protects your system while still allowing Claude to do real work.

Part 6: Core Features Every L&D Pro Should Know

1. Chat Mode (Available on All Plans)

This is the conversational interface you'll use for quick tasks: brainstorming session outlines, getting feedback on a learning objective, and asking questions about instructional design theory. It's a standard back-and-forth conversation.

Quick Chat Example:

"Review these 3 learning objectives and tell me which Bloom's level each one targets. Suggest revisions to bring any that are below Application level up to at least Application: [paste your objectives]"

Chat is ideal for quick back-and-forth like this. You'll get feedback in seconds.

Key features within Chat:

- **Projects:** Group related conversations together with shared context. Create a project for each training program or initiative, upload relevant documents, and every conversation within that project can reference them.
- **Artifacts:** When Claude creates code, documents, or visualizations, they appear as standalone interactive objects in the sidebar. You can iterate on them, copy them, or download them.
- **Web Search:** Claude can search the internet in real time. Ask it to find the latest research on microlearning effectiveness or pull current salary benchmarks for L&D roles.
- **Extended Thinking:** Toggle this on for complex tasks. Claude will spend more time reasoning through multi-step problems before responding, which improves accuracy in areas such as evaluation framework design and gap analysis.
- **File Uploads:** Drag and drop documents, spreadsheets, images, or PDFs directly into the chat. Claude can read and analyze them.

2. Cowork Mode (Pro Plans and Above)

Cowork is Claude's autonomous execution mode. The key difference from Chat: you describe a goal, and Claude independently takes the steps needed to achieve it. This includes reading files on your computer, creating new documents, running code, searching the web, and using connected apps.

What Cowork can do:

- Create formatted Word documents, PowerPoint presentations, and Excel spreadsheets
- Read and analyze files in your selected folder
- Run Python scripts for data analysis
- Search the web and synthesize research

- Connect to Google Workspace, Notion, Outlook, and other apps via MCP connectors
- Open and edit Excel and PowerPoint files through Office add-ins
- Schedule recurring tasks (daily reports, weekly summaries) using /schedule

3. Scheduled Tasks

Type /schedule in any Cowork session to create tasks that run automatically. Example uses for L&D: generate a weekly summary of new industry articles, compile a Monday morning briefing of upcoming training sessions from your calendar, or create a monthly report template pre-populated with the current date and quarter.

4. Plugins and Skills

Plugins bundle specialized capabilities into installable packages. Skills are reusable instruction sets that tell Claude how to handle specific task types, like creating presentations or writing in a brand voice. Both are managed through the Customize menu (covered in Part 5). Skills get dedicated deep-dive coverage in Part 9, including how to install starter skills for L&D work and create your own.

5. MCP Connectors

Model Context Protocol (MCP) connectors let Claude interact with external services. The current connector library includes Google Drive, Gmail, Google Calendar, Notion, Asana, Jira, GitHub, Slack, Confluence, and dozens more. On Claude Desktop (but not the web interface), you can configure these in Settings to give Claude access to your existing tools.

Part 7: Chat vs. Cowork (When to Use Which)

One of the most common early questions: when should I use Chat, and when should I use Cowork? They aren't interchangeable. Each mode has strengths, and choosing the right one for the task saves time and produces better results.

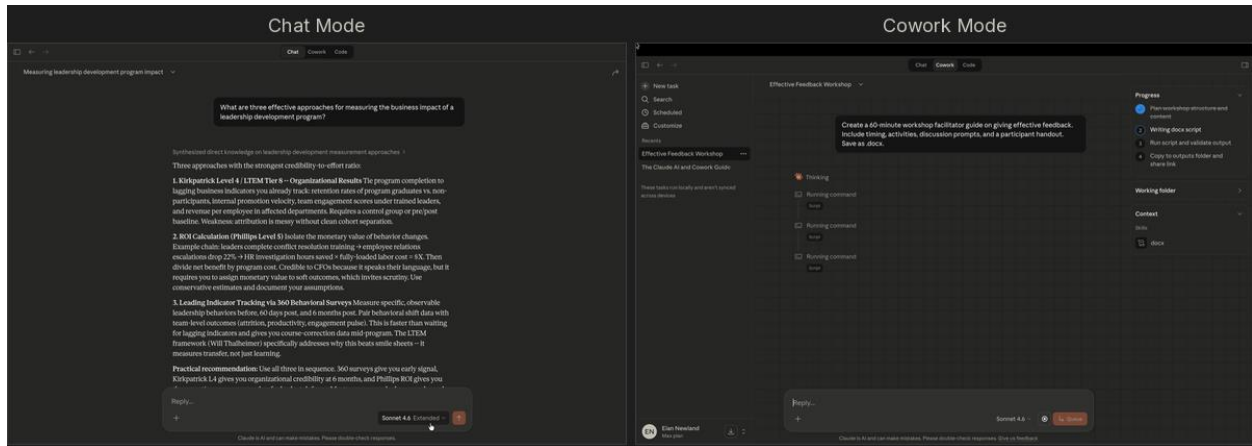


Figure 5: Chat mode (left) is conversational and iterative. Cowork mode (right) executes tasks autonomously and delivers finished files.

Use Chat When...

- You want a back-and-forth conversation (brainstorming, getting feedback, asking questions)
- The task is primarily about thinking, not producing files
- You need to iterate quickly through ideas before committing to a direction
- You want to switch between models mid-conversation (Opus for strategy, Sonnet for drafting)
- You're working on short-form content (an email, a Slack message, a single assessment question)
- You want to use Projects to maintain a persistent context across multiple conversations

Use Cowork When...

- The output is a file: a .docx, .pptx, .xlsx, .pdf, or code file
- The task requires multiple steps that Claude should execute autonomously
- You need Claude to read files from your computer and produce new files based on them
- The task involves web research combined with document creation
- You want to step away and come back to a finished product
- You need Claude to interact with connected services (Google Drive, Notion, Calendar)

Quick Cowork Example:

"Create a one-page PDF job aid for managers on how to conduct a 30-day check-in with new hires. Include 5 conversation starters, 3 red flags to watch for, and a follow-up action checklist. Save it to my folder."

This is a task where Cowork shines: Claude creates the actual file and saves it for you.

Task	Best Mode	Why
Brainstorm 10 ideas for a team-building workshop	Chat	Conversational, iterative, no file output needed
Create a 30-slide onboarding presentation	Cowork	File creation, multi-step, autonomous execution
Get feedback on a learning objective you wrote	Chat	Quick back-and-forth, thinking task
Analyze a 200-row survey spreadsheet and create a summary report	Cowork	File reading + file creation + analysis
Draft 3 versions of a training announcement email	Chat	Short-form, want to compare options in conversation
Build a full curriculum design document from a competency framework	Cowork	Complex, multi-file, long-running task
Ask whether Gagne's or Merrill's framework fits a particular scenario better	Chat	Knowledge question, needs discussion
Convert an ILT facilitator guide into an eLearning storyboard (.xlsx)	Cowork	File input, file output, format conversion

How to Set Up and Configure Projects (Chat Mode)

Projects are Chat mode's organizational backbone. They let you group related conversations together with shared context, uploaded knowledge files, and standing instructions. Think of a Project as a persistent workspace for a specific initiative.

Creating a Project

1. In Claude (web or desktop), click **Projects** in the left sidebar, then **New Project**.
2. Give it a descriptive name (e.g., "Q2 Leadership Development Program" or "HIPAA Training Redesign").
3. Add **Project Instructions** (the gear icon or settings). These function as standing instructions that apply to every conversation within this project. This is where you define Claude's role, your standards, and your constraints.

4. Upload **Knowledge Files**: competency frameworks, brand guidelines, previous deliverables, style guides, evaluation data. Claude can reference these in any conversation within the project without you re-uploading them.

Writing Effective Project Instructions

Project instructions are the single most impactful personalization feature. Here's a template for L&D work:

Example: L&D Project Instructions Template

```
# Role You are a senior instructional designer supporting the L&D team at [Company]. You specialize in [compliance training / leadership development / technical skills / etc.]. # Standards - Learning objectives use Bloom's taxonomy action verbs at Application level or above - All content follows our brand voice: professional but approachable - Assessment questions use scenario-based formats, not pure recall - We follow Kirkpatrick's model for evaluation design - Documents should be formatted for immediate use (no manual cleanup needed) # Audience Our primary learners are [role/level] with [X years experience]. They have [high/moderate/limited] tech comfort. Training is delivered via [LMS/VILT/hybrid]. # References I've uploaded our competency framework, brand style guide, and two example facilitator guides that represent our quality standard. Match their tone and structure. # Output Preferences - Prefer .docx for training documents, .xlsx for storyboards and data - Include facilitator notes/talking points when creating session materials - Flag any assumptions you're making so I can correct them
```

What to Upload as Knowledge Files

The documents you upload to a Project become Claude's persistent reference library. For L&D projects, the highest-value knowledge files are:

- **Competency frameworks** for the audience you're designing for
- **Brand/style guides** so Claude matches your organization's voice and formatting
- **Example deliverables** that represent your quality standard (a great facilitator guide, a well-structured storyboard)
- **Evaluation rubrics** or assessment standards you need content to align with
- **Organizational context** documents (org charts, strategic priorities, current training catalog) so Claude understands what already exists
- **SME interview notes or raw content** that Claude needs to transform into structured training materials

Free plan users can create up to 5 projects. Pro and above have no project limit. Each project supports multiple knowledge file uploads.

Part 8: Personalizing Claude for Your L&D Work

Claude offers multiple layers of personalization that stack on top of each other. Understanding these layers and configuring them intentionally is the difference between Claude feeling like a generic chatbot and feeling like a team member who knows your organization, standards, and preferences.

The Four Personalization Layers

Each layer has a different scope. They stack from broadest (applies everywhere) to narrowest (applies to one session):

Layer	Scope	Where to Set It	What It Controls
1. Profile Preferences	All conversations, all modes	Settings > Profile	Your background, role, general preferences. Applies to every Claude interaction.
2. Styles	All conversations (selectable)	Settings > Styles	How Claude communicates: tone, verbosity, formatting. You can create multiple styles and switch between them.
3. Project Instructions (Chat)	All conversations within a Project	Project Settings > Instructions	Role, standards, constraints, audience context. Plus uploaded knowledge files Claude can reference.
4. Cowork Instructions	All Cowork sessions (global) or per-folder	Settings > Cowork > Global Instructions / Folder instructions	Standing preferences for autonomous task execution: output formats, methodology, quality standards.

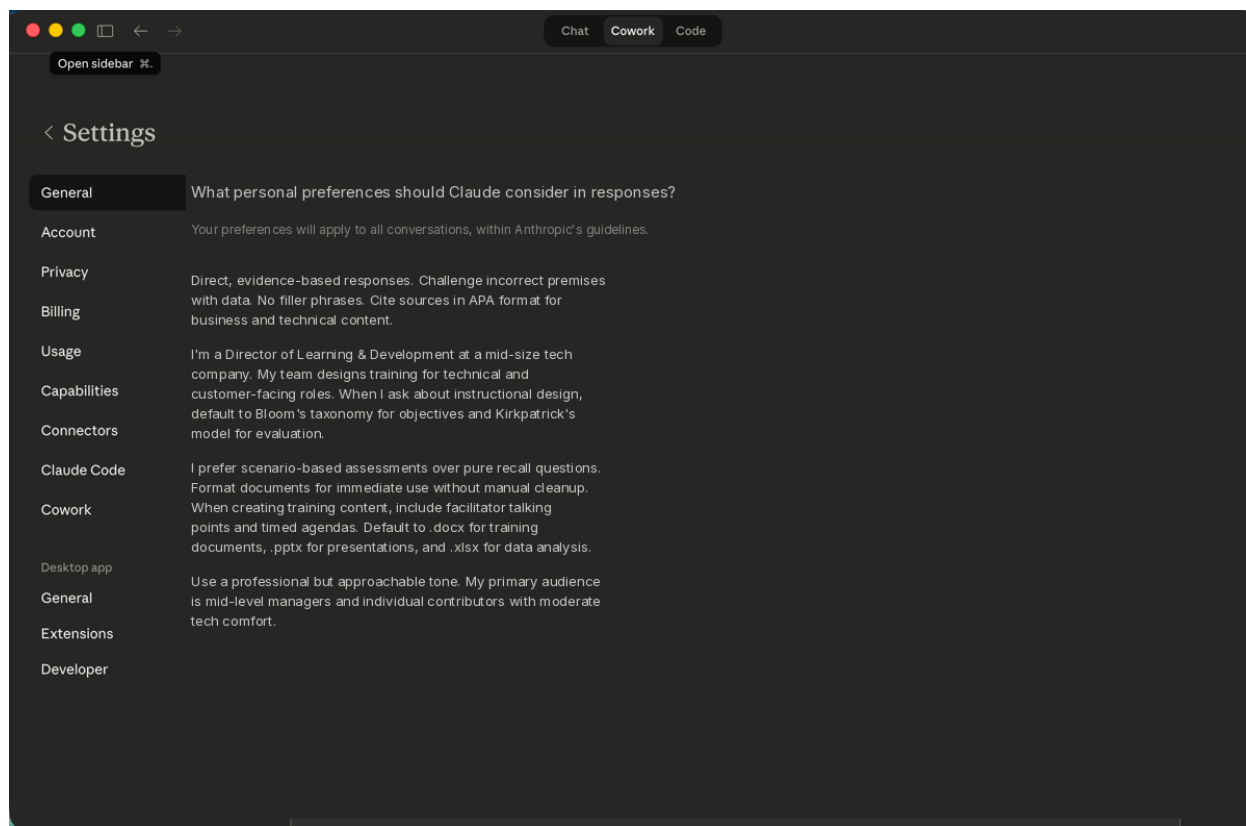


Figure 6: Profile Preferences. Tell Claude about your role, expertise, and communication preferences. These apply to every conversation automatically.

Layer 1: Profile Preferences (Set Once, Applies Everywhere)

Find this in Settings > Profile. This is your baseline identity that Claude references across all conversations and modes. For L&D professionals, include:

- Your role and experience level ("Director of L&D at a 2,000-person SaaS company")
- Your primary domain ("compliance training," "leadership development," "technical skills")
- Your default audience ("We primarily train mid-level managers and individual contributors")
- Communication preferences ("I prefer direct, evidence-based responses. Cite sources when referencing research.")

Layer 2: Styles (Control How Claude Communicates)

Styles control Claude's communication format separately from content. You can create custom styles or choose from presets. For L&D work, consider creating two styles:

- **"Professional Deliverable"** for when Claude is drafting training documents, reports, or stakeholder communications. Set this to formal, comprehensive, well-structured output.
- **"Working Session"** for brainstorming and iterating. Set this to concise, direct, conversational. Skip the formalities and get to the substance.

To create a custom style: go to Settings > Styles, click Create Style, and either describe how you want Claude to write or paste a sample of your own writing for Claude to match.

Layer 3: Project Instructions + Knowledge Files (Chat Mode)

Covered in detail in Part 7. This is where most L&D professionals should invest their setup time. A well-configured Project, with clear instructions and relevant knowledge files, transforms Claude from a general assistant into a domain specialist who knows your organization's standards.

Layer 4: Cowork Global and Folder Instructions

Global Instructions (Apply to Every Cowork Session)

Find this in Settings > Cowork > Global Instructions. These are standing preferences that load automatically whenever you start a Cowork session. Good global instructions for L&D work:

Example: Cowork Global Instructions for L&D

I'm a Director of Learning & Development. When creating training content: - Use Bloom's taxonomy action verbs for learning objectives (Application level or above by default) - Format all documents for immediate use, no manual cleanup needed - Default to .docx for training documents, .pptx for presentations, .xlsx for storyboards and data analysis - Include facilitator talking points when creating session materials - When designing assessments, use scenario-based questions, not pure recall - If you're unsure about organizational context, flag assumptions rather than guessing - Search the web for current research when making evidence-based recommendations - Follow Kirkpatrick's evaluation model when discussing training effectiveness

Folder Instructions (Project-Specific Context for Cowork)

When you select a folder in Cowork, Claude can read folder-level instructions that override or supplement your global instructions. These are particularly useful when you have distinct project areas with different standards.

Folder instructions can be set through the Cowork interface when selecting a folder. Claude can also update these during a session as context develops. Example: your "Compliance Training" folder might have instructions specifying regulatory frameworks and citation standards, while your "Leadership Development" folder references a different competency model and evaluation approach.

How the Layers Stack

All active layers combine. If your Profile says you're an L&D Director, your Style is set to "Professional Deliverable," and your Project Instructions include a competency framework plus standards for assessment design, Claude will reference all these simultaneously when generating content. More specific layers override broader ones when they conflict: folder instructions override global instructions, and project instructions override profile preferences.

Setup Investment: 30 Minutes That Change Everything

Most people skip personalization and go straight to prompting. This is like hiring a new team member and never onboarding them. Spend 30 minutes configuring your Profile Preferences, one custom Style, Cowork Global Instructions, and one Project with instructions and knowledge files. The quality difference in Claude's output is immediate and compounding: every future interaction benefits from the setup you do once.

Part 9: Skills: Teaching Claude How You Work

Skills are one of the most powerful and underused features in Claude Desktop. A skill is a set of instructions packaged into a folder that teaches Claude how to handle a specific type of task. When you install a skill, Claude automatically uses it when the task matches the skill's description. No slash commands or special triggers required for built-in skills. Claude reads the instructions and follows them.

What Skills Actually Do

Think of skills as specialized training for Claude. Without skills, Claude uses its general knowledge to create a PowerPoint, and you end up with a generic result. With a presentation skill installed, Claude follows a specific methodology: proper slide layouts, consistent formatting, speaker notes, and professional design patterns. The difference is significant.

Skills work in both Chat and Cowork modes. Claude checks which skills are enabled, reads their instructions when relevant, and applies them to the task. You can have multiple skills active simultaneously.

Built-in Anthropic Skills

Claude comes with several pre-built skills from Anthropic. These activate automatically in Cowork when Code Execution is enabled (Settings, then Capabilities). Toggle them on in Customize, then Skills:

Skill	What It Does	L&D Use Case
Word (.docx)	Professional document creation with formatting, headers, page numbers, tables of contents	Facilitator guides, training manuals, course outlines, evaluation reports
PowerPoint (.pptx)	Slide deck creation with proper layouts, speaker notes, consistent design	Training presentations, onboarding decks, stakeholder readouts
Excel (.xlsx)	Spreadsheet creation with formulas, formatting, charts, data analysis	Training metrics dashboards, assessment scoring, budget tracking
PDF	PDF creation, form filling, merging, splitting, text extraction	Compliance forms, certificate templates, handout generation

Why Skills Matter for Quality

Without the docx skill, Claude creates Word documents using basic methods that often produce generic formatting. With the skill enabled, Claude follows a detailed methodology that includes proper heading hierarchy, professional typography, page breaks, and document metadata. The same applies to presentations and spreadsheets. Always keep these built-in skills toggled on.

Installing Custom Skills

Custom skills are where things get interesting for L&D. You can install skills that others have created or build your own. Here's the installation process:

1. Navigate to Customize, then Skills in Claude Desktop.
2. Click the "+" button and select "Upload a skill."
3. Upload a .zip file containing the skill folder. The zip should contain a folder named "Skill".md file inside it.
4. The skill appears in your skills list. Toggle it on.
5. Test it by giving Claude a task that matches the skill's description.

Custom skills you upload are private to your account. On Team or Enterprise plans, organization owners can provision skills across the team through admin settings.

Finding Skills

Several sources for pre-built skills:

- **Anthropic's Skills Directory:** Visit claude.com/connectors to browse professionally built skills from partners like Notion, Figma, and Atlassian.
- **GitHub:** Anthropic maintains an open-source skills repository at github.com/anthropics/skills with community contributions.
- **Community:** The Claude community on Discord, Reddit (r/ClaudeAI), and various blogs share custom skills. Always audit skills from untrusted sources before installing, as they contain instructions that Claude will follow.

Creating Your Own Skills (The Basics)

A skill is just a folder containing a Skill.md file. That file has two parts: YAML frontmatter (metadata) at the top, and markdown instructions below it. Here's the minimum structure:

```

1 ---
2 name: compliance-training-builder
3 description: >
4   Build compliance training modules with scenario-based
5   assessments, Kirkpatrick evaluation frameworks, and
6   automatic SCORM packaging for LMS deployment.
7 triggers:
8   - compliance training
9   - regulatory module
10  - SCORM package
11 model: sonnet-4.6
12 tools:
13   - filesystem
14   - web_search
15 ---
16
17 # Compliance Training Builder
18
19 ## Instructions
20
21 When the user asks to create compliance training:
22
23 1. Gather requirements: regulation, audience, deadline
24 2. Design assessment: scenario-based questions using
25   Bloom's taxonomy action verbs at the Application level
26 3. Build module: use the standard SCORM template
27 4. Evaluate: map to Kirkpatrick Levels 1-3
28
29 ## Example Prompt
30
31 <role>Compliance training specialist </role>
32 <context>HIPAA recertification due Q2 </context>
33 <task>Create 5 scenario-based assessments </task>

```

YAML Frontmatter
Defines metadata, triggers, and tool access

Markdown Body
Step-by-step instructions for Claude to follow

Prompt Templates
Reusable XML structured prompts

Figure 7: A skill is a folder containing a SKILL.md file with YAML frontmatter (name, description) followed by markdown instructions. Additional resource files are optional.

Skill.md format:

The file starts with YAML frontmatter between triple dashes. Two fields are required: name (max 64 characters, human-readable) and description (max 200 characters, this is what Claude uses to decide when to activate the skill). Below the front matter, write your instructions in Markdown.

Starter Skills for L&D Professionals

Here are five custom skills worth creating early in your Claude journey:

1. Brand Voice Skill

Captures your organization's writing style, tone, and terminology. Include examples of approved language, words to avoid, and formatting preferences. Claude will apply this voice to every document it creates.

2. Learning Objectives Skill

Instructs Claude to use Bloom's taxonomy and the Mager approach when writing learning objectives. Include your organization's objective format template, action verb lists by cognitive level, and examples of well-written objectives.

3. Course Outline Skill

Standardizes how Claude structures course outlines. Define your preferred format: module breakdown, timing estimates, activity types, assessment checkpoints, and facilitator notes sections. Include a template that Claude should follow.

4. Evaluation Framework Skill

Teaches Claude your evaluation methodology. Map Kirkpatrick levels to your specific measurement tools. Include templates for Level 1 reaction surveys, Level 2 knowledge checks, Level 3 behavior observations, and Level 4 business impact analysis.

5. Compliance Training Skill

If you do regulatory or compliance training, create a skill with your compliance requirements, mandated language, required disclaimers, and audit trail formatting. Claude will include these automatically in any compliance-related content.

Skill Development Tip

Start simple. Your first skill can be just 10 lines of instructions in the Skill.md file. Test it, see what Claude does well and where it misses, then iterate. The description field is critical because it determines when Claude activates the skill. Be specific: "Apply Acme Corp brand guidelines to all written content" works better than "Brand voice helper."

Managing Skills

In the Customize menu, you can toggle individual skills on and off, delete custom skills (click the three-dot menu), and see when each skill was installed. Keep skills toggled off when they're not relevant to avoid conflicting instructions. For example, if you have both a "formal compliance" skill and a "casual newsletter" skill, toggle on only the one that matches your current task.

Part 10: Your First Cowork Session (Step by Step)

Let's walk through a practical first task: creating a facilitator guide for a 60-minute workshop on giving effective feedback.

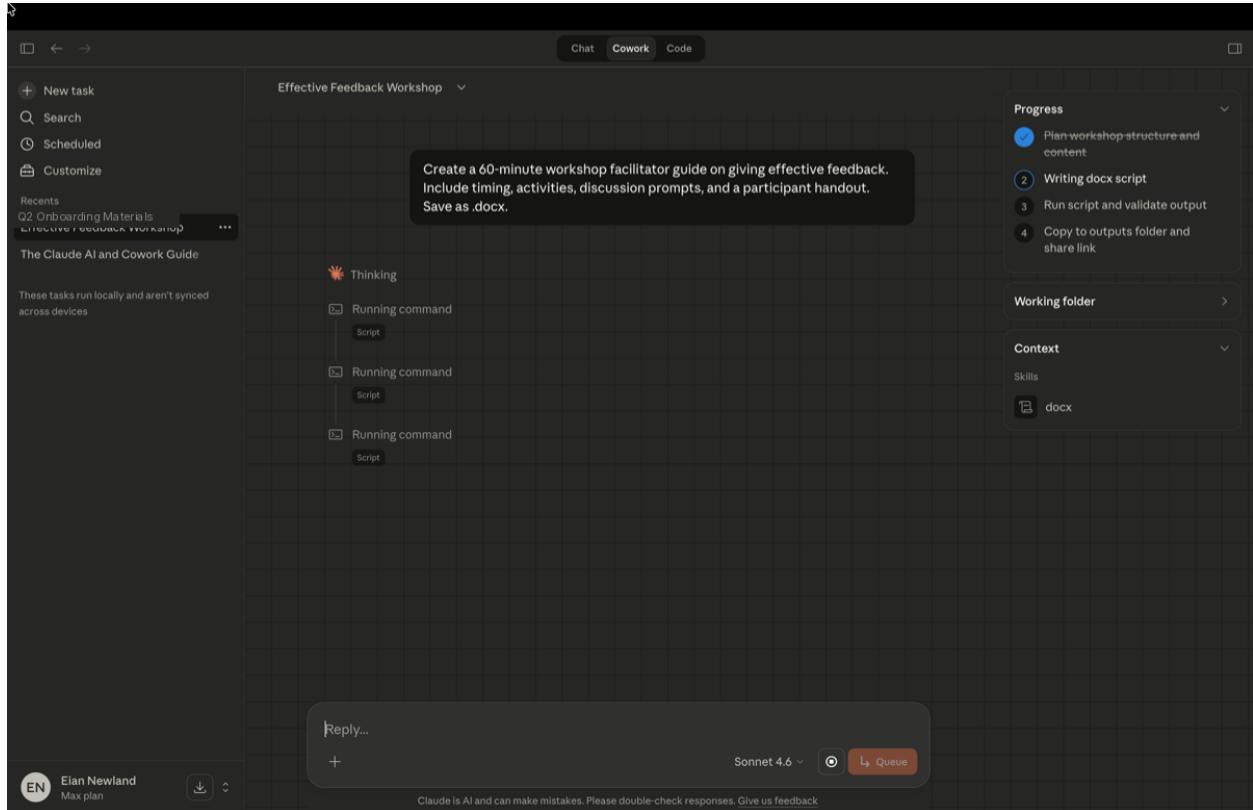


Figure 8: A Cowork session in action. Claude reads relevant skills, executes each step autonomously, shows a progress checklist, and delivers the finished file.

1. Open Cowork and Select Your Folder

Click the Cowork tab. Select or create a folder (e.g., "Facilitator Guides"). Claude now has read/write access to this folder.

2. Write Your Task Description

Be specific about the outcome you want. Here's an example prompt:

Example Prompt:

Create a facilitator guide (.docx) for a 60-minute virtual workshop titled "The Feedback Loop: Giving and Receiving Feedback That Sticks." Target audience: mid-level managers with 2-5 years of experience. Include a timed agenda, facilitator talking points for each section, 2 interactive activities (one breakout room exercise, one polling activity), a participant handout appendix, and 3 discussion questions. Learning objectives should use Bloom's taxonomy action verbs at the Application level. Format with clear section headers and page numbers.

3. Watch Claude Work (or Step Away)

Claude will show you its progress in real time: reading any relevant files in your folder, searching the web for current research on feedback training, drafting the document structure, writing each section, and saving the final .docx file to your folder. You can watch or minimize the window and come back when it's done.

4. Review and Iterate

Once Claude finishes, it will provide a link to the completed file. Open it directly from the chat. If you want changes, just describe them in natural language: "Move the polling activity to before the breakout exercise, and add a 5-minute debrief after each activity." Claude will edit the file in place.

Pro Tip: Provide Reference Materials

Before starting a Cowork task, drop any reference files into your selected folder: your organization's brand guidelines, previous facilitator guides, competency frameworks, or style guides. Claude will read them and match the style and standards automatically.

Part 11: 10 Real-World L&D Scenarios with Claude

Scenario 1: Needs Assessment Analysis

The task: You've collected 200+ survey responses about training needs across the organization. You need to identify themes, prioritize gaps, and present findings to leadership.

Mode: Cowork

Prompt: "I need to present training priorities to our VP of People next week. Analyze the training needs survey results in survey-results.xlsx. Identify the top 5 skill gaps by department, cross-reference with our competency framework (competency-framework.pdf in this folder), calculate priority scores based on frequency and business impact, and create a one-page executive summary as a .docx with a visual priority matrix. Make the summary detailed enough to stand alone without a verbal walkthrough."

Time saved: What typically takes 2-3 days of manual coding and analysis takes 30-90 minutes, depending on data complexity.

Scenario 2: Curriculum Design from Scratch

The task: Design a 6-module onboarding program for new sales representatives.

Mode: Cowork

Prompt: "Design a 6-module onboarding curriculum for new sales reps. Each module should include learning objectives at Bloom's Application level or higher, a 90-minute session outline with timed activities, prerequisite knowledge, an assessment strategy (a mix of knowledge checks and practical demonstrations), and resources needed. Create a .docx with a curriculum map overview table on page 1. Our sales methodology is [your methodology]. New reps typically have [X background]."

Scenario 3: Converting Instructor-Led Training to eLearning

The task: You have a 4-hour classroom course on data privacy. Leadership wants an asynchronous version.

Mode: Cowork

Prompt: "We're moving our data privacy training from classroom to self-paced eLearning. The content needs to be engaging enough to hold attention without a live facilitator. Read the instructor-led training guide (data-privacy-ilt.docx) in this folder. Convert it to an eLearning storyboard with a recommended module breakdown (15-20 minutes each), narration scripts for each screen, interaction types (drag-and-drop, scenario branching, knowledge checks), and a visual description column for the graphic designer. Save as an .xlsx storyboard template."

Scenario 4: Assessment Question Writing

The task: Create a 50-question assessment bank for a compliance training program.

Mode: Chat (Sonnet 4.6)

Prompt: "We need a question bank for our annual healthcare compliance certification. Learners are clinical staff who deal with real patient data daily, so questions need to reflect actual workplace decisions, not textbook definitions. Write 50 multiple-choice questions. Requirements: all questions at Bloom's Application level or above (no pure recall), each question must include a realistic workplace scenario, 4 answer options with plausible distractors, the correct answer with a brief explanation of why it's correct, and why each distractor is wrong. Organize by topic: HIPAA (15 questions), workplace safety (15), anti-harassment (10), conflict of interest (10). Save as .docx."

Scenario 5: ROI Calculation and Business Case

The task: Build a business case for a new leadership development program with projected ROI.

Mode: Cowork

Prompt: "I need to get budget approval from our CFO for a leadership development program. Create a business case document (.docx) for a program targeting 40 high-potential managers. The CFO is data-driven and will want to see hard numbers. Include: executive summary, needs analysis summary (I'll provide the data), program design overview, detailed cost projection (facilitator fees, materials, technology, participant time), ROI calculation using Phillips ROI methodology, projected benefits (retention improvement, promotion readiness, engagement scores), risk mitigation plan, and implementation timeline. Search for current benchmarks on leadership development program costs and outcomes."

Scenario 6: Learning Metrics Dashboard Design

The task: Design a quarterly L&D metrics report that maps to LTEM (Learning-Transfer Evaluation Model) levels.

Mode: Cowork

Prompt: "Create an Excel dashboard template (.xlsx) for quarterly L&D reporting. Include sheets for: Participation metrics (completions, attendance, NPS), Learning metrics (assessment scores, skill demonstrations), Application metrics (manager-reported behavior change, on-the-job observations), Business Impact metrics (KPI movement, performance review correlation). Each sheet should have a summary row with formulas, conditional formatting for targets, and a dashboard summary sheet with charts."

Scenario 7: Microlearning Content Series

The task: Create a 10-part microlearning series on project management fundamentals.

Mode: Cowork

Prompt: "Our team leads need project management basics but have no time for a full course. We're delivering this as a daily 5-minute Slack-based learning series. Create a 10-part microlearning series on project management fundamentals. Each module should be 5-7 minutes of content. For each module, create: a one-page content script with key concepts, one scenario-based practice activity, one knowledge check question, and a one-line 'apply this today' action item. Save all 10 modules in a single .docx with clear module separators. Follow a spaced repetition pattern where each new module briefly references concepts from 2 modules back."

Scenario 8: Stakeholder Communication Templates

The task: Create a set of email templates for common L&D communications.

Mode: Chat (Sonnet 4.6)

Prompt: "I send these types of emails repeatedly and need polished templates I can customize quickly. Write 8 email templates for common L&D scenarios: (1) training launch announcement, (2) reminder to complete mandatory training, (3) post-training feedback request, (4) manager toolkit for reinforcing training, (5) quarterly L&D newsletter format, (6) SME content review request, (7) program completion congratulations, (8) training needs survey invitation. Each should have a subject line, body with [bracketed placeholders] for customization, and a professional but warm tone. Save as a single .docx organized with clear section headers."

Scenario 9: Competitive Analysis of LMS Platforms

The task: Research and compare 5 LMS platforms for a potential migration.

Mode: Cowork

Prompt: "Research the top 5 LMS platforms for a mid-size tech company (500-2000 employees). Compare: pricing models, SCORM/xAPI compliance, built-in authoring capabilities, AI features, integration options (HRIS, Slack, Teams), reporting depth, mobile experience, and implementation timeline. Search for current 2026 reviews and pricing. Create a comparison matrix in .xlsx with weighted scoring, plus a 2-page executive recommendation in .docx."

Scenario 10: Workshop Slide Deck Creation

The task: Build a complete slide deck for a 90-minute workshop on change management.

Mode: Cowork

Prompt: "Create a PowerPoint presentation (.pptx) for a 90-minute workshop on change management for frontline supervisors. Include: title slide, agenda, learning objectives (3 max), content slides using Kotter's 8-Step Model adapted for frontline leaders, 2 interactive activity instruction slides, a case study slide with discussion questions, key takeaways, and resources slide. Use a clean, professional design. Speaker notes should include facilitator talking points for each slide. Target 25-30 slides."

Part 12: Prompt Engineering for L&D

The quality of Claude's output is directly proportional to the quality of your input. What follows is adapted from Anthropic's official prompting best practices documentation, updated specifically for the 4.6 model family and translated into L&D context. These aren't third-party tips. This is what the model's creators recommend.

Anthropic's Six Core Principles (Applied to L&D)

Anthropic organizes its prompting guidance into six foundational techniques. Here's each one with an L&D-specific application:

1. Be Clear and Direct

Anthropic's golden rule: show your prompt to a colleague who has minimal context on the task and ask them to follow it. If they are confused, Claude will be too. For L&D work, this means naming the exact deliverable, format, audience, and quality standard.

The 4.6 models are more concise by default than earlier versions. If you want detailed, comprehensive output (which you usually do for training content), explicitly request it. A prompt like "Create an analytics dashboard" will get a basic result. Adding "Include as many relevant features and interactions as possible. Go beyond the basics to create a fully featured implementation" gets substantially better output.

L&D Application

Instead of "Write training content about leadership," try: "Create a 20-minute microlearning module on situational leadership for new team leads (1-6 months in role) at a SaaS company. Include a narration script, 2 branching scenarios where the learner chooses a leadership style, and a self-assessment checklist. Learning objectives should use Bloom's Application level. Format as a .docx ready for SME review."

2. Add Context (Explain WHY, Not Just WHAT)

Providing motivation behind your instructions helps Claude generalize intelligently. Instead of listing rigid rules, explain the reasoning. Claude will then apply that reasoning even in situations your rules didn't anticipate.

L&D Application

Instead of: "Don't use jargon." Try: "This content will be delivered to warehouse associates with an average reading level of 8th grade. Many are non-native English speakers. Use plain language so the safety procedures are understood and followed correctly, which directly impacts incident rates." Claude will generalize from that context across the entire document.

3. Use Examples Effectively (Few-Shot Prompting)

Examples are one of the most reliable ways to steer Claude's output format, tone, and structure. Anthropic recommends 3-5 diverse examples wrapped in <example> tags. For L&D

professionals, this is powerful: upload a facilitator guide you liked, a well-written assessment, or a storyboard format you want replicated. One good example communicates more than paragraphs of description.

Make your examples diverse enough to cover edge cases. If you only show Claude formal facilitator guides, it won't know you also want casual discussion prompts in the breakout sections. Include examples that show the range you expect.

4. Structure Prompts with XML Tags

This is an Anthropic-specific technique that most L&D professionals won't be familiar with. Claude is trained to parse XML tags, which means you can organize complex prompts into clearly labeled sections. This matters when your prompt mixes instructions, reference documents, and variable inputs. Use consistent, descriptive tag names. For examples you want Claude to follow, wrap them in `<example>` tags (or multiple inside `<examples>`) so Claude can distinguish examples from instructions.

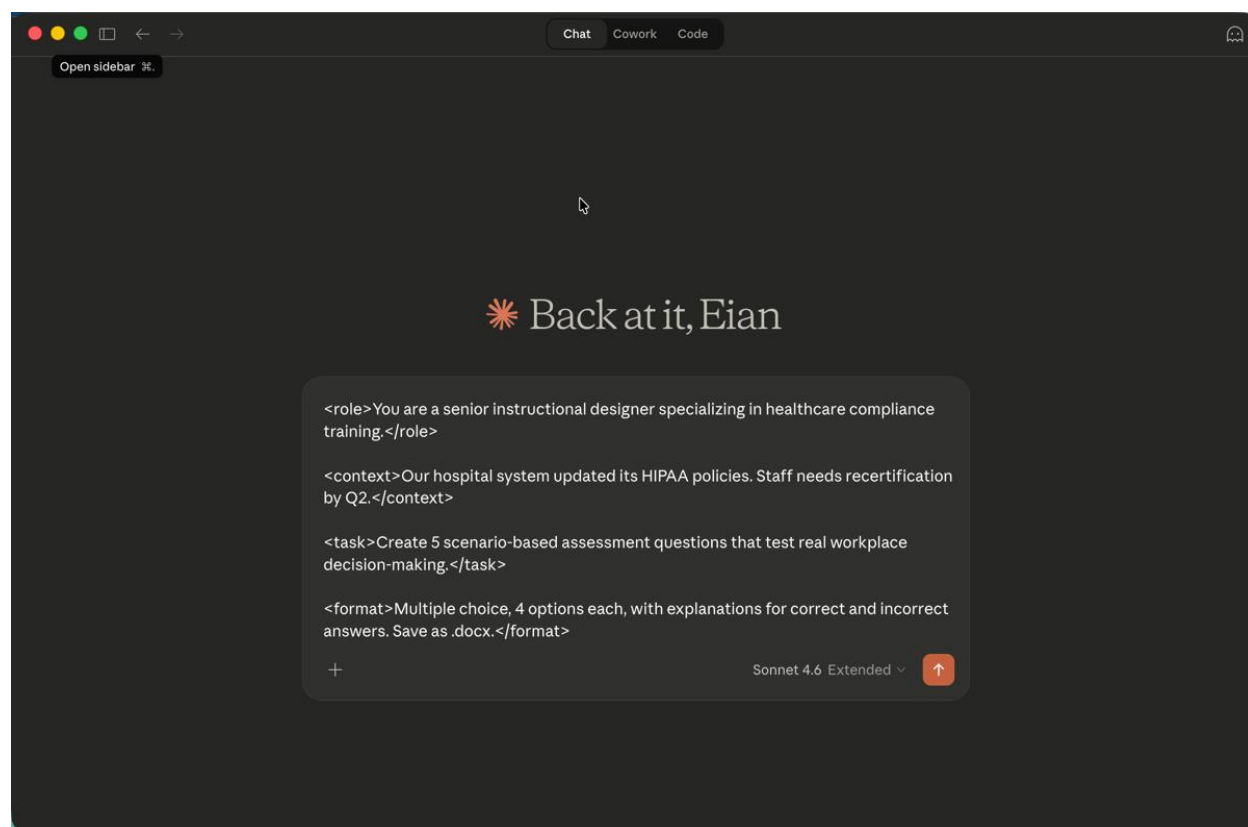


Figure 9: An effective prompt structure using XML tags. Each section (role, context, task, format) is clearly labeled, making it easy for Claude to parse your intent.

Example: XML-Structured L&D Prompt

```
<role>You are a senior instructional designer specializing in compliance training for healthcare organizations.</role> <context>Our organization has 2,000 employees across 12 locations. We're migrating from classroom-based HIPAA training to a blended model. Average learner tech comfort is
```

```
moderate.</context> <task>Design a 4-module blended HIPAA training program.</task>
<requirements> - Each module: 20 minutes async + 30 minutes VILT reinforcement - Learning
objectives at Bloom's Application level or above - Include scenario-based assessments, not recall
questions - Align to our competency framework (uploaded as hipaa-competencies.pdf)
</requirements> <output_format>Create a .docx curriculum design document with a module
overview table on page 1, followed by detailed module designs.</output_format>
```

5. Give Claude a Role

Even a single sentence setting Claude's role focuses its behavior and tone. For L&D work, specify the type of instructional design expertise you need. "You are a senior instructional designer with 15 years of experience in healthcare compliance training who specializes in scenario-based learning" produces different output than "You are an L&D coordinator preparing quick-reference job aids."

6. Long Context: Documents First, Query Last

When working with large documents (competency frameworks, evaluation data, compliance manuals), Anthropic's research shows that placing documents at the top of your prompt and your question at the bottom improves response quality by up to 30%. In Cowork, this happens naturally when Claude reads files from your folder. In Chat, upload your documents first, then type your question after.

For multi-document tasks, Anthropic recommends asking Claude to quote relevant passages before analyzing them. This technique grounds Claude's response in the actual source material rather than its general knowledge, reducing hallucination risk on factual content like policy documents.

What Changed with the 4.6 Models

If you've read prompting guides written for earlier Claude models (or for ChatGPT), several things have shifted. These are directly from Anthropic's migration documentation:

- **The models are more concise by default.** Earlier Claude versions were verbose. The 4.6 models skip preambles and summaries unless you ask for them. For L&D, this means explicitly requesting comprehensive output when you need it: "Create a thorough, detailed facilitator guide. Include facilitator talking points for every section."
- **Anti-laziness prompting now backfires.** Older guides recommended aggressive language like "CRITICAL: You MUST complete the entire document" or "Do NOT skip sections." With 4.6, these cause over triggering and overengineering. Use normal language instead: "Complete all sections of the facilitator guide."
- **Adaptive thinking replaces manual controls.** Claude 4.6 dynamically decides how much time to spend reasoning through a problem. For complex tasks like Kirkpatrick Level 3-4 evaluation design or multi-source gap analysis, you don't need to say, "think step by step." Claude does this automatically. You can still nudge it: "This is a complex

analysis. Take time to consider the data from multiple angles before making recommendations."

- **Tell Claude what TO DO, not what NOT to do.** Instead of "Don't use bullet points," say "Write in flowing prose paragraphs." Instead of "Don't make it too formal," say "Use a warm, conversational tone appropriate for mid-level managers." Positive instructions produce better results than prohibitions.
- **Explicitly request 'above and beyond' when you want it.** Anthropic's docs use this exact phrase. If you want Claude to go beyond a basic result, say so: "Include as many relevant features and interactions as possible. Go beyond the basics to create a fully featured implementation." For L&D, this means adding modifiers like "Create a thorough, comprehensive facilitator guide" or "Include detailed speaker notes for every slide" when you want production-quality output rather than a first draft.

Prompts That Work vs. Prompts That Don't

Weak Prompt	Strong Prompt	Why It's Better
Write me some training content about leadership.	Create a 20-minute microlearning module on situational leadership for new team leads (1-6 months in role) at a SaaS company. Include a narration script, 2 branching scenarios where the learner chooses a leadership style, and a self-assessment checklist. Bloom's Application level. Save as .docx.	Names format, audience, context, activities, pedagogical level, and file type. Follows Anthropic's 'be clear and direct' principle.
Analyze this survey data.	Analyze the attached training needs survey (250 responses). Identify the top 5 skill gaps by department, cross-reference with the competency framework I've uploaded, and create a prioritized recommendation list with estimated development hours. Output as a .docx executive summary with a data appendix.	Provides context (why), specifies cross-referencing (multiple documents), and defines output structure. Follows 'add context' and 'long context' principles.
Make a presentation about onboarding.	Create a .pptx (20-25 slides) for our Q2 L&D review with the VP of People. Include: before/after onboarding metrics (I'll provide data), learner satisfaction trends, time-to-productivity improvements, 3 recommendations for Q3, and an appendix with methodology. Speaker notes with facilitator talking points on every slide. Clean, data-forward design.	Specifies audience (VP-level), deliverable details, and explicitly requests 'above and beyond' features like speaker notes. Matches Anthropic's guidance on requesting comprehensive output.

Advanced Techniques from Anthropic's Documentation

Self-Verification

Anthropic recommends asking Claude to verify its own work. Append something like: "Before finalizing, verify that every learning objective starts with a measurable action verb at Bloom's Application level or above. Flag any that use 'understand,' 'learn,' or 'know.'" This catches errors reliably, especially for structured content like assessment rubrics and curriculum maps.

Iterative Refinement (Chain, Don't Restart)

Start broad, then narrow. Ask Claude to create a curriculum outline first, review it, adjust, then ask it to flesh out individual modules. Within a conversation, Claude retains full context, so saying "Expand Module 3 with more detail on the role-play activity" works better than re-prompting from scratch. This mirrors instructional design practice: design the architecture before building the rooms.

Constraint Setting

Constraints produce more targeted output than open-ended requests. Good constraints for L&D work: "Every module must be completable in under 20 minutes. All scenarios must reflect realistic workplace situations in our industry. Assessment questions must have 4 options with plausible distractors, not obviously wrong answers. Each module should reference concepts from 2 modules back for spaced repetition."

Ground Responses in Your Documents

When Claude is working with uploaded documents (competency frameworks, evaluation data, policy manuals), ask it to quote relevant passages before drawing conclusions. This grounds the analysis in your actual organizational content rather than Claude's general training data.

Example: "Quote the specific competency descriptions from the framework that are not currently addressed by any existing training module, then recommend new content to fill those gaps."

Part 13: Connectors and Integrations

Claude becomes significantly more powerful when connected to your existing tools. MCP (Model Context Protocol) connectors let Claude read from and write to external services directly.

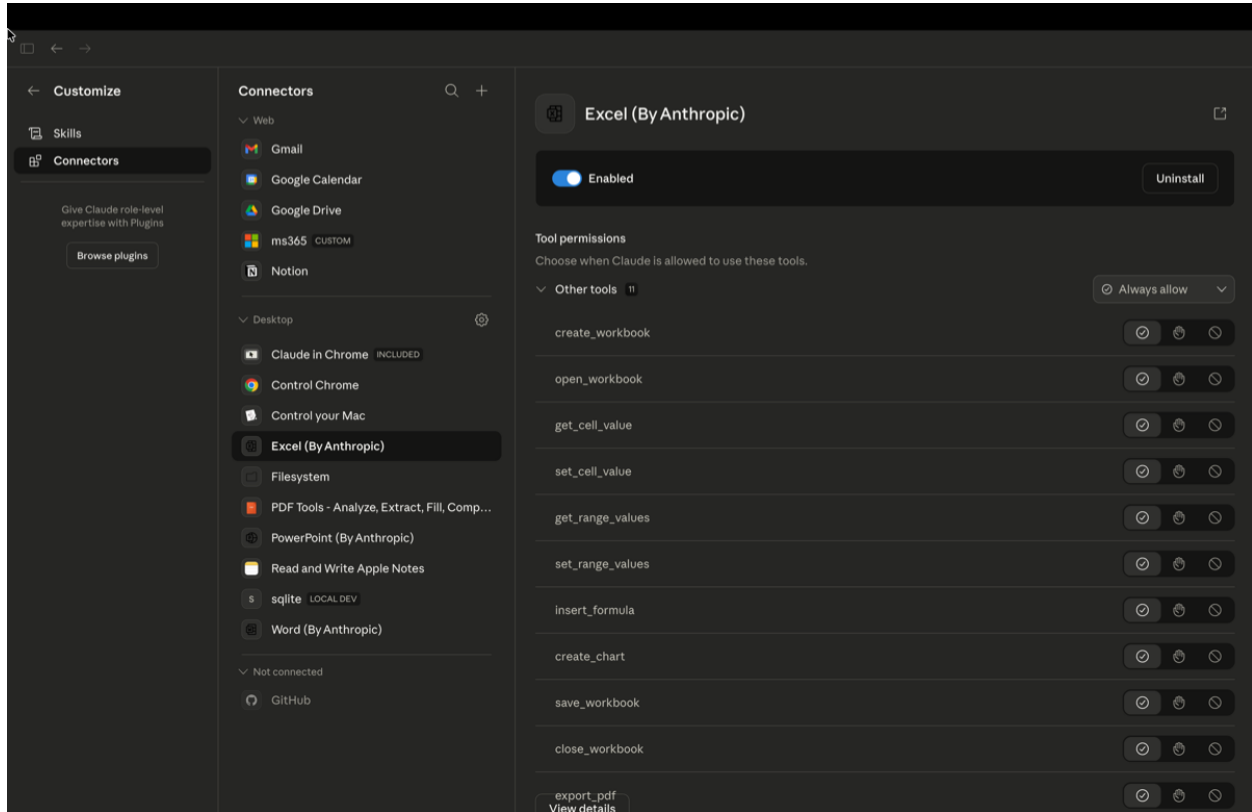


Figure 10: The Connectors panel. Green badges indicate active connections. Click Connect on any service to authenticate and give Claude access.

Available Connectors (as of March 2026)

Category	Connectors	L&D Use Case
Productivity	Google Drive, Google Docs, Google Calendar, Gmail, Notion, Outlook	Access existing training docs, schedule sessions, manage project tracking
Project Management	Asana, Jira, Linear, Trello	Track curriculum development projects, manage SME review cycles
Communication	Slack, Microsoft Teams	Search past discussions for training needs, draft announcements
Development	GitHub, GitLab	Version control for eLearning source files, collaboration on content

Design	Figma, Canva	Access design assets, create learning graphics
Knowledge	Confluence, SharePoint	Search organizational knowledge bases, access existing documentation
Automation	Zapier (6,000+ apps)	Connect Claude to virtually any tool in your stack

Setting Up a Connector

1. Open Claude Desktop and go to Settings.
2. Navigate to the Connectors or MCP section.
3. Browse available connectors and click Connect on the one you want.
4. Authenticate with the service (you'll be redirected to log in to Google, Notion, etc.).
5. Once connected, Claude can access that service in both Chat and Cowork modes.

Understanding Connector Permissions

Every connector operates on a permission model that controls what Claude can see and do within each connected service. Understanding these permissions is important before you connect anything, especially in an enterprise environment.

How Permissions Work

When you connect a service like Google Drive or Notion, you authenticate with that service using your own credentials. Claude then operates with the same access level you have. If you can view a document in Google Drive, Claude can read it. If you have edit access to a Notion database, Claude can modify entries. Claude never has more access than you do.

Read vs. Write Permissions

Most connectors support both read and write operations, but you should think carefully about which you need. For research and analysis tasks (summarizing training evaluations, searching Confluence for existing content), read-only access is sufficient and lower risk. For workflow tasks (creating Notion entries, sending calendar invites, drafting emails), write access is required but introduces the possibility of Claude taking actions in your connected systems.

Permission Best Practices for L&D Teams

- **Start with read-only where possible.** Connect Google Drive for reading training documents before enabling write access. This lets you evaluate Claude's understanding of your content before it starts creating or modifying files in your systems.

- **Use a dedicated workspace for testing.** Before connecting Claude to your production Notion workspace or main Google Drive, create a test folder or workspace. Run a few tasks there to see how Claude interacts with the service and what changes it makes.
- **Understand data flow.** When Claude reads from a connected service, that content enters the conversation context. If you're working with sensitive employee data (performance reviews, compensation information, HR records), be aware that Claude's AI models process this data. Review Anthropic's data retention policies for your plan tier.
- **Review organizational policies.** If you're on an Enterprise or Team plan, your organization's admin may have already configured which connectors are allowed and what permission levels are available. Check with your IT or security team before connecting services that contain sensitive data.
- **Revoke what you don't need.** Periodically review your connected services in Claude Desktop Settings. If you connected Slack for a one-time research task and no longer need it, disconnect it. Fewer active connections mean a smaller surface area.

Connector	Typical L&D Permission Level	What Claude Can Do	What to Watch For
Google Drive	Read + Write	Read docs, create new files, organize folders	Will access any file you can access. Use folder-level sharing controls.
Google Calendar	Read + Write	View schedule, create events, send invites	Can send calendar invites to others on your behalf. Verify before confirming.
Gmail	Read + Draft	Read emails, create drafts	Can read all email you have access to. Use drafts rather than auto-send.
Notion	Read + Write	Read/create database entries, edit pages	Changes to shared databases are visible to your team immediately.
Slack	Read	Search messages, read channels	Accesses channels you're a member of. May surface sensitive conversations.
SharePoint	Read	Search documents, read pages	Inherits your organizational access level. Enterprise policies may restrict this.

Start with Google Drive

If you store training documents, course outlines, or evaluation data in Google Drive, connecting it first gives you the highest immediate value. You can ask Claude to "find and summarize all facilitator guides in my Training Materials folder" or "analyze the course evaluation spreadsheet from last quarter's leadership program."

Enterprise and Team Plan Note

Organization owners on Team and Enterprise plans can control Claude's network access and connector availability through Admin Settings. If a connector you need isn't available, it may be disabled at the organizational level. Check with your admin or IT team.

Part 14: From Beginner to Power User

The features covered so far will get you productive with Claude. This section covers the practices that distinguish casual users from those who treat Claude as a genuine work partner. These patterns come from real-world daily use, not theory.

Building a Mature Global Instructions File

Part 8 introduced Cowork Global Instructions with a starter example. Here's what a production-grade instruction file looks like after a few weeks of refinement. Power users build theirs iteratively, adding a line every time Claude does something they have to correct.

Categories to include in your Global Instructions:

- **Identity and Role:** Your title, domain, team size, and organizational context. "Director of L&D at a 2,000-person SaaS company. Team of 8 instructional designers. Primary audience: customer-facing teams and mid-level managers."
- **Communication Style:** How you want Claude to write and respond. "Direct, evidence-based. No filler phrases. Cite sources in APA format for business content. Warm but professional. Challenge incorrect premises with data."
- **File Naming Conventions:** Standardize output filenames to keep files organized automatically. Example patterns: "Date format: YYYY-MM-DD prefix for versioned files. Course outlines: outline-[program]-[YYYY-MM-DD].docx. Presentations: deck-[topic]-[audience].pptx. Reports: report-[type]-[YYYY-MM-DD].xlsx."
- **Document Standards:** Set expectations for every file type. "Word documents: professional formatting, proper heading hierarchy, page numbers. Presentations: one idea per slide, mobile-readable text. All outputs should be immediately usable without manual cleanup."
- **Methodological Preferences:** Your default frameworks. "Use Bloom's taxonomy for objectives, Mager approach for writing them. Kirkpatrick evaluation model. LTEM for impact measurement. Scenario-based assessments over pure recall."
- **Permission Boundaries:** Tell Claude what to do automatically vs. what requires your approval. "Execute immediately: file creation, research synthesis, content drafting, data analysis. Ask permission only for: permanent deletion, publishing content publicly, anything involving credentials." This is critical for Cowork efficiency. Without it, Claude asks you to approve every step.
- **Connected Systems:** Reference the tools Claude has access to. "Notion: primary knowledge management. Google Drive: file storage. Outlook: calendar and scheduling." This helps Claude choose the right tool without asking.
- **Research Preferences:** Where Claude should look first. "For L&D research: ATD, SHRM, Deloitte, McKinsey, Josh Bersin as priority sources. Favor original sources over aggregators."

- **Session Handoff Protocol:** How to handle the end of long sessions. "At session end, summarize focus of session, key decisions made, completed items, next actions needed, and open questions." This creates a record you can paste into the next session to maintain continuity.

Build It Incrementally

Don't try to write your full instructions file in one sitting. Start with identity, style, and permission boundaries (takes 5 minutes). Then every time Claude does something you have to correct, add a line. After two weeks of daily use, you'll have a comprehensive instruction file that makes Claude feel like it's been working with you for months.

Session Handoff: Solving the Memory Problem

Claude doesn't retain memory between Cowork sessions. Every session starts fresh. This is the most common frustration for new users. Power users solve it with a session handoff protocol.

How it works:

Add a line to your Global Instructions: "At the end of each session, provide a session summary including what we worked on, key decisions made, what was completed, next steps, and any open questions." When a session ends (or when you're approaching context limits in a long session), Claude produces a structured handoff. Copy that summary and paste it at the start of your next session: "Here's where we left off," followed by the summary.

What this gives you:

- Continuity across sessions without true memory
- A running log of decisions and completed work
- The ability to hand off context to a colleague (they paste the same summary to pick up where you stopped)
- Protection against lost work if a session crashes or times out

Using Databases for Tracking

Cowork can create and query SQLite databases, which is useful for tracking things over time: training completions, evaluation scores, project timelines, or any structured data that accumulates across sessions. Unlike spreadsheets, databases handle relational data well and can be queried with SQL.

L&D example:

Ask Claude to create a training tracking database with tables for programs, sessions, attendees, and evaluation scores. In future sessions, tell Claude to add new records or query for insights: "Show me average satisfaction scores by program for Q1" or "Which programs have completion rates below 80%?" The database persists in your selected folder between sessions.

Multi-Connector Workflows

Individual connectors are useful. Combining them is where real workflow automation happens. Once you have multiple connectors enabled, you can ask Claude to chain actions across systems in a single request.

Examples of chained workflows:

- **Meeting prep:** "Pull my calendar events for tomorrow, find related documents in Google Drive, and create a one-page prep brief for each meeting as a .docx file."
- **Training report:** "Read the evaluation survey results from the Excel file in my folder, calculate summary statistics, create a Kirkpatrick analysis document, and draft an email to my stakeholder with the key findings."
- **Content pipeline:** "Search my Google Drive for the latest product update document, extract the key changes, create a training module outline in Notion, and draft a facilitator guide as a Word doc."
- **Weekly digest:** "Check my Gmail for any training requests from the past week, check my calendar for upcoming training sessions, and compile a Monday morning briefing that includes both."

Start with two-system chains (Drive + document creation) before attempting three or four-system workflows. Each connector adds a point of possible failure, and debugging is easier with fewer moving parts.

Building a Skill Library

Part 9 covered installing and creating individual skills. Power users build a library of skills that work together. A mature L&D skill library might include 10-15 skills covering document types, voice/tone, frameworks, and workflow automation.

How to organize your skill library:

- **Core output skills:** One skill per document type you produce regularly. Course outline skill, facilitator guide skill, assessment skill, storyboard skill. Each one encodes your organization's template, formatting standards, and required sections.
- **Voice and brand skills:** Separate skills for different communication contexts. A "formal stakeholder" voice for executive reports. A "learner-facing" voice for training content. A "newsletter" voice for external communications.
- **Workflow skills:** Skills that encode multi-step processes. A "content review" skill that checks documents against your quality criteria. A "Notion cataloging" skill that files research articles with proper metadata. A "job posting analysis" skill that extracts requirements and maps them to qualifications.
- **Integration skills:** Skills that work with specific connectors. A "Google Drive filing" skill that uses consistent folder structures. A "calendar prep" skill that generates specific document types from meeting metadata.

Toggle skills on and off based on your current task. Having 15 skills all active simultaneously can create conflicting instructions. Active skill discipline keeps Claude focused.

Scheduled Tasks for Recurring Work

The `/schedule` command in Cowork creates tasks that run automatically. For L&D professionals, common scheduled tasks include:

- **Monday morning briefing:** Weekly. Pulls calendar events, compiles training session schedule, flags any prep needed.
- **Industry research digest:** Weekly. Searches for new articles on topics you specify (e.g., "AI in corporate training," "microlearning effectiveness"), summarizes findings.
- **Monthly metrics template:** Monthly. Creates a pre-formatted report template with current date, quarter, and placeholder sections for your standard KPIs.
- **Content audit reminder:** Quarterly. Scans your training content folder and flags files that haven't been updated in 6+ months.

To create a scheduled task: type `/schedule` in any Cowork session. Claude walks you through defining the task name, schedule (one-time, daily, weekly, custom cron), and the instructions Claude should follow each time it runs.

The Power User Progression

Week 1: Chat conversations and basic Cowork file creation. Week 2: Global Instructions configured, built-in skills enabled. Week 3: First custom skill created two connectors active. Week 4: Session handoff protocol in place, scheduled tasks running. Month 2: Multi-connector workflows, 5+ custom skills, database tracking. This isn't a race. Each layer compounds the value of the ones before it.

Part 15: Tips, Limitations, and What's Next

10 Tips for Getting the Most Out of Claude

1. **Upload examples of what you want.** A sample facilitator guide, slide deck, or assessment teaches Claude your standards better than any description.
2. **Use Projects to maintain context.** Create a project for each major initiative. Upload your competency frameworks, brand guidelines, and templates once, then reference them across multiple conversations.
3. **Turn on Extended Thinking for complex tasks.** Curriculum design, gap analysis, evaluation framework creation: all benefit from Claude taking extra time to reason through the problem.
4. **Set global Cowork instructions.** Tell Claude your default preferences once (formatting standards, instructional design methodology, audience level) and they apply to every session.
5. **Iterate, don't start over.** If the first output is 70% right, tell Claude what to fix rather than re-prompting from scratch. Claude retains context within a conversation.
6. **Use Cowork for multi-file tasks.** Any task that involves creating or editing multiple files (a curriculum with 6 module documents, a training package with slides + handouts + facilitator guide) is ideal for Cowork.
7. **Specify the file format upfront.** "Create a .docx" or "Save as .xlsx" eliminates ambiguity. Claude can create Word docs, PowerPoints, Excel files, PDFs, HTML, and markdown.
8. **Reference L&D frameworks by name.** Claude knows ADDIE, SAM, Kirkpatrick, Phillips ROI, Bloom's, Mager's objectives, Gagne's Nine Events, Merrill's First Principles, and LTEM. Naming the framework gets you better-aligned output.
9. **Schedule recurring tasks.** Use /schedule for weekly research summaries, monthly report templates, or daily agenda compilations. Claude handles the routine so you can focus on strategy.
10. **Connect your tools progressively.** Start with file creation (no connectors needed), then add Google Drive, then your project management tool. Build comfort before complexity.

Current Limitations (March 2026)

Be aware of these constraints as you adopt Claude into your workflow:

- **No memory across sessions.** Each Cowork session starts fresh. Claude doesn't remember what you worked on yesterday unless you use Projects (Chat) or include reference files in your folder.
- **Claude Desktop app required for Cowork.** Cowork only runs on macOS or Windows in the Claude Desktop app. It doesn't work in the web browser or on mobile.

- **Sessions don't sync across devices.** A session started on your laptop doesn't continue on your desktop.
- **The app must stay open.** Closing the desktop app ends the Cowork session. Long tasks require the app to be running (you can minimize it).
- **Rate limits exist.** Pro plan users get approximately 45 messages every 5 hours. Heavy Cowork tasks count as multiple messages. If you frequently hit limits, consider Max.
- **AI-generated content needs human review.** Claude is remarkably good, but not perfect. Always review training content for accuracy, organizational context, and brand alignment before deploying. This is especially critical for compliance training.

What's Coming Next

Based on Anthropic's trajectory and current beta features, L&D professionals can expect continued improvements in multi-step task execution, deeper integrations with enterprise tools, and potentially LMS-specific connectors. The MCP ecosystem is growing fast, with new connectors launching regularly. Keep an eye on Anthropic's blog and the Claude help center for updates.

Ready to get started?

Download Claude Desktop at claude.com/download

Start with one scenario from Part 11. Then read Part 14 when you're ready to level up.

About the Author

Eian Newland spent the last four and a half years leading Learning & Development at Tekion, where he built and managed a 26-person global team, scaled the content library from 50 to over 600 modules, and became one of the early L&D leaders to integrate AI into production workflows, cutting development time by 31%. He writes the newsletter Learning, Upgraded, where he shares practical frameworks for L&D professionals figuring out how AI fits into their work. He's based in Salt Lake City and is always up for a conversation about what's next for the profession.

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