

## CLAUDE COWORK TRAINING SERIES

# AI Made Simple for Small Business Owners

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### SERIES OVERVIEW

SESSION	DATE	FOCUS	PRICE
Session 1	June 17, 2026	Claude Cowork Basic Setup & Your Business Context	FREE
Session 2	July 2026 — Exact date TBD	SOPs & Process Docs	\$25/person
Session 3	August 2026 — Exact date TBD	Proposals & Client Reports	\$25/person

**Format:** 90-minute in-person hands-on workshops — participants prompt and build alongside the instructor

**Audience:** Solo and small-team coaches, consultants, and service professionals who have experimented with AI tools and are ready to build real systems that save them time every week.

### IDEAL ATTENDEE PROFILE

*Seating for this series is strictly limited. These qualifiers are designed to help you self-select honestly — the right room makes every session better for everyone.*

#### ✓ This series IS for you if...

- You run a solo or small-team coaching, consulting, or service business (1–10 people)

#### X This series is NOT for you if...

- You have no prior experience with AI or digital tools and aren't comfortable learning new software in a group setting

- You've tried ChatGPT or another AI tool but haven't gotten real, consistent time savings yet
  - You spend hours each week on proposals, client reports, or processes you wish you could systematize
  - You can't justify hiring help right now — but you need the output a hire would produce
  - You're ready to actively build alongside the instructor and leave each session with something you'll use the next day
  - You want to reclaim 5+ hours a week to focus on growing your business — not just running it
- You prefer to sit back and watch — every session requires you to actively build alongside the instructor
  - You're already using Claude Cowork to build advanced automations and multi-step workflows
  - You're not currently running or actively launching a business
  - You're looking for a one-time quick fix — the full value of this series comes from attending all three sessions in sequence

**SESSION  
1 FREE****AI Made Simple**

Your First Hour with Claude Cowork • June 17, 2026

**Goal**

Build and take home your first AI-powered business asset — a polished professional bio drafted and refined in the session, ready to use on your website or LinkedIn by tomorrow. The prompting skills and personal voice you develop here become the foundation for everything you build in Sessions 2 and 3.

**What to Bring**

A laptop or tablet with Claude installed and an active Claude license (required to access Claude Cowork). Setup instructions will be sent ahead of time — arrive ready to log in and explore.

**AGENDA****0:00–0:10**

**Welcome & Introductions** Instructor and participant intros — share your name, business, and one thing you hope AI can help you with.

**0:10–0:25**

**What Is Claude Cowork & Why It Matters for Your Business** What AI can (and can't) do • Why Cowork is different from a basic chatbot • Quick showcase of real small-business use cases.

**0:25–0:40**

**Getting Set Up & Taking the Tour** Log in to Claude Cowork • Tour of the interface • Your very first prompt: ask Claude to describe your business in one sentence.

**0:40–1:05**

**Hands-On Practice — The Art of the Prompt** What makes a great prompt (specificity, context, tone) • Live instructor demo • Participants write and refine their own prompts • Group share-out.

**1:05–1:20**

**Mini-Build: Your Professional Bio** Use Claude to draft a polished “About Me” or “About Us” paragraph for your website or LinkedIn • Participants personalize and refine with follow-up prompts.

**1:20–1:30**

**Wrap-Up, Q&A & What's Next** Key takeaways • Preview of Sessions 2 & 3 • Registration info for paid sessions • Open Q&A.

**INSTRUCTOR NOTES — SESSION 1**

- Print a one-page reference card with 5 starter prompts for participants to keep.

- Have a QR code or sign-up link ready for paid sessions — momentum is highest right after the free session.
- Encourage participants to bring a specific business challenge — it makes the prompting practice more relevant and memorable.
- If time allows during the mini-build, ask 2–3 volunteers to share their outputs with the group.

## SESSION 2 \$25

# Run Your Business on Autopilot

Building SOPs & Process Docs with Claude Cowork • July 2026

### Goal

Build and take home a complete Standard Operating Procedure for a real recurring process in your business — ready to use, share, or delegate immediately. This SOP documents the very workflow your Session 3 client-facing deliverables will be built around, making it the connective tissue of the full series.

### What to Bring

A laptop or tablet with Claude installed and an active Claude license (required for Claude Cowork) • Think of one recurring task in your business you wish someone else could handle — that's your SOP target.

### Prerequisite

Session 1 (or basic comfort with Claude Cowork and writing prompts).

## AGENDA

0:00–0:10

**Welcome Back & Quick Recap** Warm-up: share one way you've used Claude since Session 1 • Quick recap of prompting fundamentals.

0:10–0:25

**Why SOPs Are a Small Business Superpower** What an SOP is and why it matters for hiring, delegating, and scaling • Common SOP types for small businesses • The anatomy of a great SOP.

0:25–0:45

**Live Demo — Building an SOP with Claude** Instructor builds a Client Onboarding SOP live • Prompting strategies specific to process documentation • How to iterate and sharpen with follow-up prompts.

0:45–1:10

**Hands-On Build — Your Own SOP** Each participant picks a process to document (invoicing, client intake, social media posting, delivery/fulfillment, etc.) • Build step-by-step alongside Claude • Instructor circulates and assists.

1:10–1:20

**Review, Refine & Share** 2–3 volunteers share their SOP with the group • Peer feedback • Instructor demonstrates how to tighten language and add detail with Claude.

1:20–1:30

**Wrap-Up, Homework & Preview of Session 3** How to store, share, and maintain your SOPs • Homework: create one more SOP before next session • Preview of Session 3 (Proposals & Client Reports) • Q&A.

**INSTRUCTOR NOTES — SESSION 2**

- Prepare 3 example SOP starters in advance (client onboarding, invoice follow-up, social media scheduling) so participants who are stuck have a jumping-off point.
- Encourage specificity in prompts: “Write a step-by-step SOP for onboarding a new coaching client, starting from the signed contract through the first session.”
- Remind participants that Claude Cowork can produce their SOP as a Word document (.docx) they can take and edit immediately.
- Address the “I don’t have processes” objection — if they do it more than twice, it’s a process worth documenting.

## SESSION 3 \$25

# Win More Clients

Proposals & Client Reports with Claude Cowork • August 2026

### Goal

Build and take home a reusable proposal template and a client report template — both personalized to your business voice (established in Session 1) and built around the systems you documented in Session 2. These are tools you will reach for every single week, and they're stronger because the whole series built toward them.

### What to Bring

A laptop or tablet with Claude installed and an active Claude license (required for Claude Cowork) • A recent proposal or report you've sent a client (even a rough one) — we'll use it as raw material.

### Prerequisite

Session 1 (or basic comfort with Claude Cowork). Session 2 recommended but not required.

## AGENDA

0:00–0:10

**Welcome & Warm-Up** Quick recap of Sessions 1 & 2 • Warm-up: share a win from using Claude Cowork in your business.

0:10–0:25

**The Anatomy of a Winning Proposal** What clients actually care about • Structure of a high-converting proposal • Common mistakes Claude helps you avoid • Tone, language, and the “why us” factor.

0:25–0:45

**Live Demo — Building a Proposal Template** Instructor builds a fully customizable proposal template live • Prompting strategies for matching your brand voice • How to personalize for each new client in minutes.

0:45–1:05

**Hands-On Build — Your Proposal Template** Each participant builds their own proposal template using their real service/product • Customize sections, tone, and pricing language • Test with a sample client scenario.

1:05–1:18

**Client Reports — Show Your Value & Keep Clients Longer** Why client reports drive retention and referrals • Quick live demo: build a simple monthly client report • Prompts for summarizing results, celebrating wins, and outlining next steps.

1:18–1:30

**Full Series Wrap-Up, Celebration & Next Steps** Series recap • How to keep growing with Claude Cowork • Resources & community • Feedback form • Open Q&A.

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**INSTRUCTOR NOTES — SESSION 3**

- Have a completed sample proposal ready to show before the live demo — seeing the finished product sets expectations.
- Suggest participants bring their own logo or brand colors; Claude Cowork can embed brand voice into templates.
- For the client report segment, keep it tight — use the last 13 minutes to cover the concept and let participants experiment at home.
- End with a genuine celebration: participants have gone from AI novice to building real business assets in three sessions. Acknowledge that journey.
- Offer a follow-up resource list: prompt cheat-sheet, Cowork tips, and an optional advanced session if interest warrants it.

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