FREE DOWNLOAD • PRACTICAL PROMPT BOOK

100
Claude Tips

The Practical Prompt Book for Getting Real Work Done

Excel • Advanced Features • Cowork Workflows • Power User Moves

All 100 tips adapted for real American workflows. No fluff, no filler.

How to Use This Book

This isn't a tutorial. It's a **cheat sheet for people who are already using Claude** and want to get dramatically more out of it — faster.

Each of the 100 tips follows the same format: a short, memorable title and one or two sentences that tell you exactly what to do and why it matters. No padding.

The tips are organized into four sections based on use case — but feel free to jump around. If you work in spreadsheets all day, start there. If you're automating file workflows, skip to Cowork.

These tips were built from real usage patterns. They're designed for **office workers, freelancers, small business owners, and anyone who works with data, documents, and decisions** — not just developers.

Pick 5 tips that feel immediately useful. Apply them this week. Come back for more.

What's Inside

01	**Excel & Spreadsheet Mastery**	Tips #1–25
02	**Advanced Features & Power Moves**	Tips #26–50
03	**Claude Cowork — File & Task Workflows**	Tips #51–75
04	**Power User Tips**	Tips #76–100

01 Excel & Spreadsheet Mastery

1. **Start with your end goal**
   Before touching a cell, tell Claude exactly what you want the final output to look like — a dashboard, a report, a tracker. One clear sentence saves you hours.

2. **Ask for a sheet structure summary**
   Upload your file and ask: 'Summarize each sheet's role and key columns in 10 lines.' You'll instantly know if your data is organized or a mess.

3. **Build a jargon glossary**
   Paste your formula logic and ask Claude to create a plain-English glossary of every term, code, and abbreviation. Great for team handoffs.

4. **Explain your table like a data model**
   Describe your column relationships (foreign keys, lookup references, rollup logic) in plain English, and Claude will help you spot structural gaps.

5. **Surface your top KPI candidates**
   Drop in your data and ask: 'What are the 10 KPIs I should be tracking, and how would I calculate each one?' Let Claude audit your metrics for you.

6. **Translate formulas into plain English**
   Paste any complex formula and ask Claude to explain it like you're a smart 12-year-old. Instant clarity.

7. **Generate formulas with edge cases**
   Ask for formulas that handle blanks, errors, and exceptions up front — not after you discover the bug.

8. **Debug formula errors fast**
   Paste the formula, the error (#VALUE!, #N/A, etc.), and the expected result. Ask Claude to walk through likely causes in priority order.

9. **Trace 'where did this go wrong?'**
   Give Claude the weird output cell and ask it to reverse-engineer which inputs or logic are most likely causing the issue.

10. **Build a data quality checklist**
    Ask Claude to auto-generate a checklist for duplicates, formatting errors, blanks, and outliers specific to your dataset.

Free download from your blog • Share freely, credit kindly

11 **Design dedup rules**
Tell Claude which column should be the 'freshest wins' or 'priority column' and let it draft your deduplication logic.

12 **Standardize date formats**
Paste your messy date column and ask for a formula that converts everything to YYYY-MM-DD or your preferred format across regions.

13 **Create text cleaning rules**
Ask Claude to write rules for stripping extra spaces, removing special characters, and normalizing capitalization across your text columns.

14 **Design pivot structure first**
Before building a pivot table, ask Claude: 'How should I set up rows/columns/values/filters for [goal]?' Get the blueprint, then build.

15 **Get chart type recommendations**
Describe your KPI and audience and ask Claude which chart type — bar, line, scatter, waterfall — best communicates the story.

16 **Compress insights to 3 lines**
Ask Claude to summarize your data as: 3 key patterns + 1 target + 1 next action. Perfect for exec summaries.

17 **Run variance analysis by category**
Paste budget vs. actuals and ask Claude to explain the top 3 variance drivers and which ones need immediate attention.

18 **Analyze your top/bottom contributors**
Ask Claude to rank which categories, channels, or reps contribute most and least to your key metric — with an explanation of why.

19 **Compare segments side by side**
Ask Claude to build a comparison table across regions, channels, or products using the same benchmark columns.

20 **Model scenarios by changing one assumption**
Ask: 'If I change [variable] from A to B to C, how does that affect the bottom line?' Build a scenario table in minutes.

21 **Design a one-page dashboard layout**
Describe the 5–7 things your stakeholder cares about, and ask Claude to design the optimal single-page layout — KPIs, charts, and filters.

22 **Turn numbers into executive commentary**
Paste a row of data and ask Claude to rewrite it as a one-line business narrative your CFO would actually say.

Free download from your blog • Share freely, credit kindly

23 **Create audit trail log templates**
Ask Claude to design a one-line log entry format: [date] | [change] | [reason] | [owner]. Paste it into every sheet for traceability.

24 **Templatize repetitive tasks**
Turn any recurring report into a checklist + input template: swap values, don't rebuild from scratch every time.

25 **Always end with 'What's next?'**
Ask Claude: 'Given this data, what are the top 3 actions I should prioritize, and how long will each take?' Turn analysis into a to-do list.

Free download from your blog • Share freely, credit kindly

02 Advanced Features & Power Moves

26 Lock in your dashboard skeleton
Structure your Claude output in KPI → driver → risk → next action order. Set this once, reuse it forever.

27 Set tone and format defaults first
Tell Claude your number style, date format, currency, and writing tone at the start of every session — or save it as a project instruction.

28 Use file generation as your output format
Don't settle for text summaries. Ask Claude to output tables, documents, and reports as actual downloadable files.

29 Convert dashboards to presentation slides
Ask Claude to transform your data summary into a 'presentation-ready slide structure' — bullets become slides instantly.

30 Connect Google Drive for live data
Link Drive/Docs so Claude can always reference the latest version of your files — no more 'here's the updated version' back-and-forth.

31 Attach source files to every output
For any calculation or chart, ask Claude to include a source reference so you can always trace where a number came from.

32 Search your past conversations for gold
Before rebuilding a table or definition from scratch, search your Claude history — you've probably already solved this before.

33 Split work by project context
Create separate Claude Projects for each client, team, or product line. Keep data, tone, and outputs from bleeding into each other.

34 Add context once, reuse forever
Paste your project background — goals, audience, constraints — into the Project instructions so you don't re-explain it every session.

35 Build a project knowledge base
Collect reusable checklists, templates, definitions, and samples into a single Project context document. Reference it on demand.

Free download from your blog • Share freely, credit kindly

36 **Create a project glossary**
Lock in your team's definitions for KPIs, units, and calculation rules as a table. Share it so everyone's working from the same playbook.

37 **Fix your project guidelines once**
Define output formats — 'always use this table structure' — inside your Project settings. Stop repeating yourself.

38 **Build interactive artifact dashboards**
Charts + filters + pivot views in one shareable artifact. Way more powerful than a static screenshot.

39 **Always review before sharing**
Before any output goes external, ask Claude to strip personally identifiable info, dollar amounts, and internal code names.

40 **Package custom skills as sets**
Bundle your most-used prompt sequences (prompt + output template) into named 'Skill Sets' you can invoke with one line.

41 **Build a step-by-step dashboard SOP**
Document your production flow: data → clean → KPI → chart → comment. Turn it into a reusable Standard Operating Procedure.

42 **Merge multi-region sheets into one report**
Combine regional or team-level files into a single 'company-wide' report with Claude handling the aggregation logic.

43 **Build a one-page summary version**
After the full dashboard, ask Claude to create a stripped-down 1-page version with just the top 5 metrics and a trend line.

44 **Build a KPI scorecard**
Ask Claude to combine revenue, margin, and growth into a single scorecard table — color-coded, ranked, and ready to present.

45 **Connect KPIs to their calculation source**
For each KPI, link the formula or data source so you can trace 'why did this change?' in 10 seconds.

46 **Auto-generate chart-to-conditional logic**
Ask Claude to build a pivot summary → conditional chart in one flow. Stop doing it in two separate steps.

47 **Write P&L commentary for every line**
Paste your income statement and ask Claude to write a one-line variance explanation for each row. Audit-ready in minutes.

48 **Prepare print-ready dashboard output**
Before exporting, ask Claude to adjust margins, fonts, and scaling so your dashboard looks clean at A4 or letter size.

49 **Add guardrails to every dashboard**
Define your input constraints: valid ranges, required fields, and error states. Ask Claude to build in validation so the dashboard doesn't break.

50 **Set project permissions and scope policies**
For team use, define who can do what with Claude outputs — approval chains, edit rights, sharing rules — before you deploy.

03 Claude Cowork — File & Task Workflows

51 Find the Cowork Tasks tab first
On the Claude desktop app, switch to the Cowork (Tasks) tab before starting file-based work. That's your launchpad.

52 Know Cowork's limits before you start
Not everything can be automated. Ask Claude upfront: 'Can you handle this task fully, or will I need to step in?' Set expectations early.

53 Create a project folder per client or task
Keep one dedicated folder per project. Mixing files across projects is how things go missing and outputs get messy.

54 Standardize your folder structure
Use a consistent folder system: /raw → /working → /output → /archive. Apply it to every project, not just the big ones.

55 Always back up the original
Before any bulk editing, copy your original file and label it clearly. You want a clean rollback if something goes sideways.

56 Lock in a plan → approval → execute flow
Have Claude output the work plan first. You approve it. Then it executes. Don't let it skip steps.

57 Keep the app open while Cowork runs
Don't close the desktop app mid-task. Cowork sessions break if the app goes to sleep or quits.

58 Minimize access permissions
Connect only the folders Claude needs for the current task. Broad access = broad risk. Keep it scoped.

59 Treat web content as untrusted input
Web pages may contain prompt injection attempts. Ask Claude to process web content in isolation from your task instructions.

60 Mask sensitive data before sharing
Before uploading contracts, financials, or contact lists, replace sensitive values with placeholders. Work with a clean version.

Free download from your blog • Share freely, credit kindly

61 **Save every output as a real file**
Don't stop at a summary. Ask Claude to export the result as a document, table, or report file you can store and share.

62 **Schedule a 'folder cleanup' routine**
After each project, ask Claude to identify and delete temp files, duplicates, and download clutter from your working folder.

63 **Use consistent file naming conventions**
Format: YYYY-MM-DD_ProjectName_Version. Searchable, sortable, and everyone on the team will thank you.

64 **Auto-convert formats in batch**
CSV, Markdown, Excel — ask Claude to convert all files in a folder to your standard format in one pass.

65 **Consolidate scattered notes into reports**
Dump your meeting notes, voice memos, and Slack snippets into a single folder. Ask Claude to synthesize them into a structured report.

66 **Turn meeting notes into action items**
Pull decisions, blockers, and action items out of any meeting doc and map them to owners and deadlines. Never lose a follow-up again.

67 **Convert screenshots into editable tables**
Drop a screenshot or image into Claude and ask it to restructure the visual data as a usable table or dataset.

68 **Transform research into slide-ready content**
Take raw research dumps and ask Claude to output a presentation outline: title → key points → supporting data per slide.

69 **Merge and deduplicate across sources**
Combine internal docs with web research, remove duplicates, and get a single clean summary — not three conflicting ones.

70 **Break long tasks into subtasks**
Any task that'll take more than 30 minutes should be chunked. Splitting reduces failure risk and makes progress trackable.

71 **Parallelize work with subtasks**
Run data collection, verification, editing, and formatting as separate Cowork tasks simultaneously. Cut total time in half.

72 **Always check the output before shipping**
Even if Cowork runs perfectly, do a human review pass before any output goes external. Automation needs supervision.

Free download from your blog • Share freely, credit kindly

73 **Connect Drive/Docs as your live source**
Link your Google Drive so Claude always works from the current version of your file — not a stale upload from last week.

74 **Use local extensions to go further**
If you have local browser extensions set up, they can automate repetitive Cowork tasks beyond what the default app supports.

75 **Define team access and governance policies**
Before using Cowork with a team, align on who controls which folders, who approves outputs, and how file versions are managed.

04 Power User Tips — Getting the Most Out of Claude

76 Decide if the paid plan is worth it for you
If you're handling long documents, bulk tasks, or large workloads daily, the paid plan's throughput and stability will save you time and frustration.

77 Use different models for different jobs
Use a fast model for quick drafts and brainstorming. Use the smarter model for final reviews, strategic analysis, and anything client-facing.

78 Set your defaults at the project level
Define units, output format, tone, and date style once inside your Project settings. Every response stays consistent without reminding Claude every time.

79 Use the CSF+BI prompt framework
Structure your prompts as: Context → Specific Format + Blueprint Identity. This is the cleanest way to get predictable, high-quality outputs.

80 Build a conversation search habit
Before recreating a table, definition, or template from scratch, search your Claude conversation history. You've probably done it before.

81 Audit your memory settings
If memory is on, keep sensitive work in separate sessions. Review what Claude has learned about you periodically and clean it up.

82 Draft with voice first
Talk through your idea out loud, then paste the rough transcript into Claude. You'll get a structured draft 3x faster than typing from scratch.

83 Use Incognito for sensitive tasks
Anything you don't want stored — confidential data, personal matters, sensitive client work — run it in a private/incognito session.

84 Always verify Claude's 'current' info
When recency matters, ask 'What's your knowledge cutoff for this?' before relying on the answer. Then verify with a quick search.

85 Scrub sensitive data before sharing outputs
Before any Claude output leaves your hands, replace names, amounts, and contact info with neutral placeholders. Protect your clients.

Free download from your blog • Share freely, credit kindly

86 **Use Chrome extension for in-browser speed**
The Claude Chrome extension lets you summarize, compare, and draft without switching tabs. Cuts friction in half for research workflows.

87 **Lock in your finance prompt pattern**
For financial analysis: data → analysis → output → validation. Set this as your default sequence and never deviate.

88 **Use XML tags to separate instructions from content**
Wrap your task instructions in tags like <task> and your raw content in <data>. Claude will stop mixing them up.

89 **Use web search + web fetch together**
Search for the source, then fetch the full article. Don't rely on snippet summaries — get the complete context before drawing conclusions.

90 **Lock in source references in Research Mode**
Keep source citations attached to every data point in research outputs. Never let a number float without a traceable origin.

91 **Turn on extended thinking for complex decisions**
Scenario analysis, trade-off evaluation, and strategic decisions benefit from Claude's extended reasoning mode. Use it deliberately, not as a default.

92 **Always add the uncertainty disclaimer**
Add 'If you're not sure, say so' to any factual or analytical prompt. This one rule dramatically reduces confident-sounding hallucinations.

93 **Verify links before trusting them**
At the end of every research output, paste a checklist of all URLs and ask Claude to flag any it can't confirm as real and working.

94 **Make your final output a file, not a chat message**
Don't end a session with a text block. Ask Claude to package the result as a PDF, doc, table, or slide structure you can actually use.

95 **Apply image analysis to real work problems**
Drop a screenshot, chart, or document image into Claude and ask it to extract the key data points, errors, or action items hidden in it.

96 **Connect live data sources via Connectors**
Link Drive/Docs/Sheets so Claude can always pull the latest version of your files — no manual uploads, no version confusion.

97 **Build project-level knowledge over time**
Store your templates, brand guidelines, tone rules, and SOPs in a Project context doc. Claude will apply them consistently without being reminded.

Free download from your blog • Share freely, credit kindly

98 **Turn your best prompts into SOPs**
Document your highest-performing prompt sequences as named SOPs: input format + output template + quality check. Reuse them like scripts.

99 **Use Artifacts for rapid prototyping**
Build dashboards, reports, and tools as shareable Artifacts. Share the link, get feedback, iterate — all without exporting to another tool.

100 **Automate your most repetitive tasks with code**
Any task you do the same way 3+ times a week should become a code workflow or scheduled pipeline. Stop doing it manually.

You've got 100 tools now.

The only thing left to do is use them.

Start with one tip today. Build the habit.

Found this useful? Share it with someone who needs it.

More guides, templates, and AI tips at your blog