

How to Claude



THE ONE CHEAT SHEET TO SAVE

Forward Loans®

Claude

100 million users

3 models: Opus 4.6, Sonnet 4.6, Haiku 4.5

1M

token context window

Claude is BEST at:

- **Writing** (recreating a writing style, understanding long context, writing techniques and psychology)
- **Thinking and analyzing** (1,000,000+ token context window)
- **Working with your files** (read, write, create docs/spreadsheets/decks)
- **Asking you the right questions** (AskUserQuestion)

★ Claude is not 1 tool. It's 5.

- Chat** → like ChatGPT. The one most people know. A text box. You type, it responds.
- Projects** → still Claude Chat, but separated as individual projects with persistent files.
- Code** → massive revolution for developers to code (much) faster. If you code, start here.
- Cowork** → like Claude Code but for knowledge workers. The big one if you don't code.
- Skills** → teach Claude repeatable workflows. Like better Projects.
- Connectors** → connects Slack, Google Calendar, Gmail, Notion, Canva, Gamma, + others. It reads, writes, and acts inside the tools you already use. Free.

Connectors

Claude can connect to your tools.

Settings → Connectors → Browse → Click "Add."

G

Granola

N

Notion

F

Figma

G

Gamma

D

Drive

+50 more

Claude in Excel

An AI inside your spreadsheet. It reads every tab. It knows what D14 actually contains.

Install: Excel → Insert → Get Add-ins → Search "Claude by Anthropic" → Add → Sign in.

First prompts to try:

- "Give me a summary of each tab."
- "Explain what the formula in cell B12 does in plain English."
- "Find all #REF and #VALUE errors in this workbook."

Claude works, you watch. Nothing happens without your approval.

	A	B	C	D
1	Region	Q3	Q4	YoY
2	EMEA	\$142k	\$198k	+39%
3	APAC	\$87k	#REF!	Δ Claude

Install Claude (5 minutes)

- Go to **claude.com/download**. Download the desktop app.
- You need Pro (\$20/month) or \$17/month annually.
- Open the app. Click the Cowork tab at the top.
- Select a folder from your computer.

Use the right model

OPUS 4.7

→ **smartest model**. Use for writing, thinking, analyzing, and planning. Anything that requires reasoning.

SONNET 4.6

→ **quick tasks**. Grammar, brainstorming, formatting.

HAIKU 4.6

→ **speed tier**. 1M input tokens. Bulk tasks, classification, routing.

EXTENDED THINKING

→ **Claude thinks first**, like an internal monologue, before answering. Makes a big difference.

Click the model selector dropdown at the bottom of the chat → **Select Opus 4.7** → **Turn on Extended thinking**.

Global Instructions

Go to: Settings → Cowork → Edit Global Instructions.

Paste instructions that tell Claude:

- **Read ABOUT ME/ before every task.**
- **Read the matching PROJECTS/ subfolder if relevant.**
- **Study TEMPLATES/ structure before creating content.**
- **Save all work in CLAUDE OUTPUTS/.**
- **Use AskUserQuestion if the brief is unclear.**
- **Don't over-explain. Deliver the work.**

You set this once. Your prompts can be 10 words long and still produce work that sounds like you.

Prompting Claude — the right way

Your first prompt template:

I want to [YOUR TASK] so that [WHAT SUCCESS LOOKS LIKE].

First, read the uploaded files completely before responding.

DO NOT start executing yet. Instead, ask me clarifying questions (use AskUserQuestion) so we can refine the approach together.

Only begin work once we've aligned.

The key: force Cowork to ask YOU questions. You direct. Claude executes.

Prompting philosophy:

- Context > Prompts (feed your files, not just instructions)
- Examples > Prescriptions (show what you want, don't describe it)
- Constraints > Rules (say what the output is NOT, let Claude choose how)
- Goal-oriented > Instruction-oriented (say what you want to achieve, not how)
- State the task + success criteria. 2 sentences. Done.

Plugins

11 official plugins:

Sales, Marketing, Legal, Finance, Data, Product, Support, and more.

Each plugin gives Claude specific skills and slash commands for that function.

Install: Claude Cowork → **claude.com/plugins** → Browse → Click install.

Type / in the chat to see available commands.