

GUIDE

How to Onboard Claude at RedPeg — A Guide for Account Teams

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2026-04-17

How to Onboard Claude at RedPeg

A guide for the account team. You already have the files. You already have the tools. This is about what changes when you stop uploading and start pointing.

— Ryan

The shift

Here is the thing most of us keep doing. We have a question. We open SharePoint, dig through three Asana projects, open the budget tracker from last May, find the deck, screenshot a slide, drop it into a Claude chat, and ask the question.

That worked when Claude was just a chat window. It is not the best use of Claude anymore.

The new move: point Claude at the folder, channel, or project where the stuff already lives, and ask the question there. Claude reads the folder. Claude sorts the folder. Claude spots trends you did not think to look for.

Think of it as onboarding a new hire. On day one, you would not hand them every file you have ever touched. You would show them where things live. "This is the client folder. This is where recaps go. This is the budget tracker. This is Asana." Then you would ask them to read in for a day and come back with a summary.

That is what this is. The new hire is Claude. The read-in is instant. And the folders you already built are the onboarding doc.

Three places Claude now lives

1. Claude Projects (the one you already use)

What it is: a dedicated workspace on claude.ai where you upload the stable reference material — brand guidelines, the client bio, past SOWs, the working brief. Claude uses those files every time you chat inside that project.

Best for: stuff that does not change week to week. A client's background. A pricing framework. The brand bible.

Tradeoff: the files are a snapshot. If the budget updates in SharePoint, the Projects copy does not update unless you re-upload.

2. Claude Cowork (the desktop app)

What it is: a desktop version of Claude that can reach into tools you already use. M365. SharePoint. Google Drive. Outlook. Asana. Slack. Connect the tool once. Claude can then pull from it on demand.

Best for: live questions about work happening right now. "Pull every email from USAA this week and tell me what they are worried about." "Read the Asana board for the Marriott Snow League program and give me a status report." "Look at the SharePoint folder for Meta and tell me what deliverables are outstanding."

This is the one the account team should care about most. It is the closest match to how you actually work.

3. Claude Code (sounds scary, is not)

What it is: a terminal app (yes, the black box with white text) that lets you point Claude at a folder on your computer — Desktop, Documents, a synced OneDrive folder, a Dropbox folder — and work through it at volume.

Best for: "read every recap in this folder and tell me what consistently went wrong." "Pull the total budget across all 2025 Nike programs." "Summarize every client call note for Santander this quarter." "Rename every file in this folder to match our convention."

It looks like a dev tool. It is, kind of. But the moment you ask it to read 80 post-event recap PDFs and find the three things every client complained about, you stop caring that it looks like a dev tool.

You do not need to learn it this month. It is there when you are ready.

Did you know... imagine if

These are the unlocks. Every one of them is something an account lead on our team could be doing this quarter if the folder is pointed correctly.

Did you know... you can point Claude at the Marriott SharePoint folder and ask "what did we deliver for them in 2025 and what is in flight right now?" and get the answer in 30 seconds, with the files cited.

Imagine if... every Monday morning, instead of rebuilding a status doc from memory, you asked Claude to read your Asana board and your client Outlook thread and draft the weekly status update. You edit. You send.

Did you know... you can drop every post-event recap from the past 12 months into a folder, point Claude at it, and ask "what are our clients consistently happiest about? What do they consistently flag as a miss?" That is a state-of-the-business read you used to need a week and an intern for.

Imagine if... before your next client check-in, you asked Claude to read the last three call recaps and surface every open question you have not closed yet. You walk in with the list already made.

Did you know... you can point Claude at a folder of budgets and ask "which line items did we under-estimate across the last six programs?" It will tell you. The account team has been learning that lesson case by case for years. Claude can give it to you across everything at once.

Imagine if... your job stopped being "find the file" and started being "decide what to do with what the file says."

That is the shift. File-finder to file-interpreter. The account team has always been the connective tissue. This is what connective tissue looks like with a search layer that actually works.

The one thing that makes all of this work: file names

Here is the dirty secret. Claude is only as good as your file names and folder names. If your SharePoint looks like "final_v3.pptx" and "Deck_REAL_FINAL.pptx" and "notes (1).docx," Claude will have a hard time. Not because it cannot read the files. Because it cannot tell which is which without opening all of them.

Fixing this is boring and takes a week, tops. It is also the highest-leverage hour you will spend this quarter.

The RedPeg naming pattern

The pattern is: **client, date, program, doc type**, in that order, separated by underscores.

- Nike_2026-05_CVTS-EHQ_Recap.pdf
- Marriott_2026-02_SnowLeague_Budget-v2.xlsx
- USAA_2026-03_Activation_SOW.docx
- Meta_2026-Q1_StatusUpdate_Notes.md

Why this order:

- **Client first** so everything for that client sorts together in any file browser, and Claude knows the context without you having to say it.
- **Date next (YYYY-MM)** so things sort chronologically. Year-month, always. Not "May 2026." Computers do not know months; they know numbers.
- **Program name** so you can tell the Snow League from the Bonvoy Moments pilot.
- **Doc type** at the end: Brief, Budget, SOW, Recap, Deck, Notes, Creative, Contract. One word. Same words every time.

That is it. Four tokens. If you name a file that way, you can find it in three seconds, and so can Claude.

What to stop doing

- `final_v3`, `REAL_FINAL`, `use-this-one`. Use a `drafts/` folder for versions-in-progress. The one that is current gets the clean name.
- Spaces in filenames are fine inside Word and most tools, but they are a pain in Claude Code. Dashes or underscores are safer. Dashes between words inside a token, underscores between tokens. (`Snow-League` is the program, `_` separates it from the next thing.)
- "Notes from Tuesday." Tuesday is gone. Tuesday-the-date is forever. `Client_2026-04-14_CallNotes.md` is findable. "Notes from Tuesday" is not.
- Emojis in filenames. Some tools silently mangle them.

Folder names follow the same logic

- `Clients/Nike/` — not `Clients/Nike (2024-present)/`
- `Programs/2026-05_NikeCVTS_EHQ/` — date + program, so all 2026 programs sort together
- `Clients/Nike/Budgets/` — same doc-type folders inside every client, so Claude knows where to look

A file in the right folder with the right name is already half-searched.

What the account team should actually do this month

You do not need to fix everything. You need to prove the thesis to yourself on one client.

Week 1: pick one client and clean up the folder

Pick a client you know well. USAA, Marriott, Meta — whoever you have the most active files on. Spend an hour renaming the last 20 files using the pattern above. Move them into the four or five subfolders:

`Briefs/`, `Budgets/`, `Recaps/`, `Decks/`, `Notes/`.

That is it for week one. Do not try to fix three years of history. Fix what is active.

Week 2: point Claude at it

Open Claude Cowork on your desktop. Connect it to SharePoint (or whatever tool that client lives in). Ask one question you actually want an answer to. Something like "based on everything in this folder, what is the state of this client relationship right now?"

The answer will either be good, or it will be bad. If it is bad, it is probably because the files are not labeled well yet. That is feedback, not failure. Fix two more files. Ask again.

Week 3: do it again for a second client

Now you have a pattern. It takes less time. Your muscle memory for how to name a file starts shifting without you thinking about it.

Week 4: bring one finding back to the team

One trend you would not have spotted by eyeballing files one at a time. That is the moment the investment pays off, and the moment it is worth showing the rest of the team. "Hey, I asked Claude to read every recap from Q1 and here is what kept coming up..."

What Claude is not going to do for you

Worth saying plainly:

- Claude is not going to send a client email without you reviewing it. Ever. It drafts, you send.
- Claude is not going to make a pricing decision. It can pull every past SOW and tell you what we charged. You decide what to charge next.
- Claude is not going to replace you thinking through a creative problem. It is a research layer and a first-draft layer. The thinking is still yours.
- Claude is not going to understand a client relationship the way you do. It reads the files. It does not sit in the room.

The mental model: Claude is the world's fastest research assistant, the world's most patient reader, and a decent first-draft writer. It is not a PM, not an account lead, not a strategist. You are all three.

The old folder structure guide still applies

The structure rules from the previous version still stand. One top folder per domain. Predictable sub-structure. A one-page overview note in every project folder saying what it is, where it stands, what is open. Underscore folders for staging.

None of that changed. What changed is that the payoff is now ten times higher. The folder is no longer just for you. The folder is also for the new hire who happens to be able to read a thousand pages a minute and works nights and weekends.

Treat it like an onboarding packet. Because that is what it is now.

Start small

Pick one client this week. Rename 20 files. Point Claude at the folder. Ask a question you would have been too tired to go find the answer to yourself. See what comes back.

That is the whole move.

The brain is not a tool. It is a habit. And the habit starts with one folder.

— Ryan