
Welcome to Claude.

You already have the files. You already have the tools.
This is about what changes when you stop uploading
and start pointing.

For: Account Leads, PMs, Producers · **Reading time:** 8 minutes

Next step: drop the companion file into Claude. More on that at the end.

THE SHIFT

Stop uploading. Start pointing.

Here is the thing most of us keep doing. We have a question. We open SharePoint, dig through three Asana projects, pull the budget from last May, find the deck, screenshot a slide, drop it into Claude, 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 would not have thought to look for.

Think of it as onboarding a new hire.

On day one, you would not hand a new hire 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 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 LIVES

Where to find Claude, what each one is for.

You have probably only met one of these. The other two are where the account team gets the most leverage.

FAMILIAR

01

Claude Projects

On claude.ai. Upload the stable stuff – brand bibles, past SOWs, a client bio. Claude uses those every time you chat inside that Project.

Best for: reference material that does not change week to week.

NEW FAVORITE

02

Claude Cowork

A desktop app. Connects to M365, SharePoint, Google Drive, Outlook, Asana, Slack. Pulls live from whatever you connect.

Best for: live questions about work happening now. Start here.

LEVEL 3

03

Claude Code

Terminal app. Points at a folder on your machine and reads at volume – 80 recaps, 30 budgets, every client call note from the year.

Best for: when you are ready. Not week one.

You do not need to learn all three at once. For most of the account team, start at **02 – Claude Cowork**. It is the closest match to how you actually work.

DID YOU KNOW... IMAGINE IF

Four things you could **be doing** this quarter.

Every one of these is something an account lead on our team could be doing right now 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 update. You edit. You send.

DID YOU KNOW...

You can drop every post-event recap from the past year 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.

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

File names. Boring. Essential.

Claude is only as good as your file names and folder names. If your SharePoint is full of *final_v3.pptx* and *Deck_REAL_FINAL.pptx*, Claude has 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 naming pattern

Client, date, program, doc type. In that order. Underscores between.

```
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
```

- CLIENT** First, always. Everything for that client sorts together automatically.
- DATE** Year-month (YYYY-MM). Not "May 2026." Computers know numbers, not months.
- PROGRAM** So you can tell Snow League from Bonvoy Moments.
- DOC TYPE** One word, same words every time: Brief, Budget, SOW, Recap, Deck, Notes.

Stop doing

- ✗ *final_v3*, *REAL_FINAL*. Use a `drafts/` folder. Keep the current version cleanly named.
- ✗ "Notes from Tuesday." Tuesday is gone. `Client_2026-04-14_CallNotes.md` is findable forever.
- ✗ Emojis in filenames. Some tools silently mangle them.

Start doing

- Rename 20 files for one active client this week. Muscle memory does the rest.
- Keep doc-type folders consistent: `Briefs/`, `Budgets/`, `Recaps/`, `Decks/`, `Notes/`.
- A file in the right folder with the right name is already half-searched.

YOUR NEXT STEP

Drop the companion file **into Claude.**

You have read the intro. Now let Claude walk you through the rest.

Alongside this PDF, there is a file called **redpeg-claude-kickoff.md**. It is a short briefing written for Claude to read. When you drop it into a new chat, Claude picks up where this PDF leaves off and starts a guided setup – conversational, beginner-paced, one step at a time.

HOW TO START

Three steps. Fifteen minutes.

You can do this on your lunch break.

- 1 Open Claude Cowork on your desktop.** If you do not have it yet, install it – it is included with your Claude plan. Cowork is the version that can actually reach into SharePoint, Outlook, and Asana.
- 2 Attach the companion file** – `redpeg-claude-kickoff.md` – and send it as your first message. That is it. No extra instructions needed.
- 3 Answer Claude's first question.** It will ask what you want to test connecting – SharePoint, Outlook, Asana, or a desktop folder. Pick one. Claude takes it from there.

If something does not work, the problem is almost always a file-naming issue, not a Claude issue. Go fix two files and try again. That is part of the learning.

If you get stuck, ping the team AI channel. Someone else has probably just hit the same wall.

– Ryan