

/ activate intelligence /

Claude at Excellera

Session 3

projects.

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Where we are.

four sessions. sixty minutes each. today is number three.

01

DONE

the basics. models, first chat.

02

DONE

prompting, memory, artifacts.

03

TODAY

projects. how to stop starting from scratch.

04

NEXT WEEK

advanced tools. skills, mcp, deep research and office agents.

What we'll cover.

six sections. sixty minutes. one live build at the centre.

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- 01 why projects exist, instructions and files for a project.
 - 02 let's build one. a press review project, live.
 - 03 What types of files you can add to the project.
 - 04 sharing. what colleagues see, what stays yours.
 - 05 making it better. how a project improves each time you use it.
 - 06 Cowork projects.
-

01

Why projects.

for any work you come back to – recurring tasks, ongoing projects.

A project is a saved workspace.

projects save the instructions and files for any work you keep coming back to – a recurring task or an ongoing project.

01 Instructions.

you tell claude what this task is.
who reads the result. what format.
what tone. what rules.

like briefing a new colleague
on their first day.

02 Files.

you upload the documents
claude needs every time.
a style guide. last month's report.
the client glossary.

three to five files.

every new chat inside the project already knows what you're working on and has the files it needs.

What goes in good instructions.

five things. five to ten lines. tight beats long.

01 – the task.

what claude is doing. "you are creating..."

02 – the audience.

who reads it, when, what they need.

03 – the structure.

sections, format, length.

04 – the rules.

always do this. never do that.

05 – the references.

the files you've uploaded.

EXAMPLE

you are creating a daily press review
for greentech italia.

the audience is the head of communications.
she reads it at 8am. one page.

structure: executive summary (3 lines),
flag-worthy items, tonality paragraph,
sources list (alphabetical).

never use promotional language.

write in Italian.

use the brand lexicon and last week's example.

Memory and Project instructions.

They're not the same thing.

Memory = who you are.

your name. your role. your language.
your preferred tone.

set once. applies everywhere.

Project = what you're doing.

this task. this client. this format.
these files.

applies only inside this project.

if memory is on, claude builds memories from your work inside a project — but each project has its own memory, scoped to that project alone.

02

Let's build one.

a press review project, from zero to working.

L I V E D E M O

Daily press review for GreenTech Italia.

we build a real project together - name it, write the instructions, upload the files.

Writing instructions is hard. We made a tool.

a prompt that interviews you about your task, then writes the instructions for you.

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- 01 — open a new chat in claude. do not create the project yet.
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- 02 — paste the prompt we will share with you. send it.
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- 03 — claude asks you questions about your task. one at a time. answer in italian or english.
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- 04 — after six to eight questions, claude gives you two things: the instructions, and a list of files to upload.
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- 05 — create the project. paste the instructions. upload the files. done.
-

the prompt is in your shared channel. you can use it after this session.

03

Your files.

what you can upload.

What you can upload.

these are the file types you use every day. all of them work.

Documents.

pdf, word (.docx), plain text
(.txt).

parliamentary reports, press
releases, client briefs, past
deliverables.

Data.

excel (.xlsx), csv.

monitoring source lists, client
rosters, glossaries, contact lists.

Presentations.

powerpoint (.pptx).

pitch decks, past proposals,
client presentations.

also: images (.jpg, .png), html pages, and markdown files.

Your old chats can move into a project.

you don't have to start over.

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- 01 – open the chat you want to move.
 - 02 – click the three dots (...) at the top right of the chat.
 - 03 – choose "move to project." pick the project.
 - 04 – the whole conversation moves. the project's instructions and files now apply to it.
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tip: if a chat keeps coming back – same topic, same client, same format – it wants to be a project.

04

Shared and private data.

what your colleagues see, and what stays private.

What you share. What stays private.

SHARED

when you share a project, your colleagues see:

- the instructions (the brief)
- the files (style guide, glossary, examples)
- any changes you make to either

PRIVATE

your colleagues cannot see:

- your conversations with claude
- the questions you asked
- the outputs you received

on claude team, your conversations are not used to train claude.

build it privately first. share it once it works.

05

Making it better.

a project is never finished. it gets better each time you use it.

Two places to fix.

when an output from the agent is not right, the problem is in one of two places.

The output shape is wrong.

wrong format, wrong length, wrong tone, wrong structure.

fix the instructions.

add a line. remove a line. be more specific.
"always use bullet points" or "never longer than one page."

The output content is wrong.

wrong facts, wrong terms, missing context.

fix the files.

upload a better example. add the glossary you forgot.
swap last month's report for this month's.

Three things not to do.

common mistakes when people start.

01 — don't upload fifty files.

five good files work better than fifty random ones. choose the ones claude needs most.

02 — don't write five hundred lines of instructions.

usually a few lines is enough. if the instructions are longer than the output you want, something is wrong.

03 — don't put the same rules in memory and in a project.

your name and language go in memory. task's rules and format go in the project.

06

Cowork Projects.

projects on your desktop. claude that reads your folders, runs in parallel, and gets the work done.

Browser vs Desktop.

mostly the same. one tab is different.

What's the same.

chat works the same.
projects work the same.
your conversations follow you between the two.

What the desktop adds.

a tab the browser doesn't have.
it's called cowork.

cowork only lives on the desktop.

What Cowork is.

chat runs in the cloud. cowork runs on your machine.

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- | | | |
|-----------|------------------------------------|---|
| 01 | it delegates to sub-agents. | for complex work, claude breaks the job into pieces and runs several agents in parallel. |
| 02 | it runs on your machine. | chat runs on anthropic's servers and has no access to your computer. Cowork is running locally. |
| 03 | it works with your files. | read, edit, create — in folders you choose. nothing happens in folders you haven't shared. |
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chat is one claude, one task, in the cloud. cowork is many claudes, one job, on your desktop.

Cowork projects.

Projects are defined by three main questions.

WHERE

pick a folder.

choose carefully — claude won't touch anything outside it.

HOW

write the instructions.

the same as for projects in claude chat.

plus which files to read, where to save the result and how to name it, and when to pause and ask before anything you can't undo.

WHAT

describe an outcome.

"process this folder of press coverage and produce the daily review."

claude plans, shows you, then does the work.

you can't build a project in the browser and open it in cowork. rebuild or import it in cowork when you need it there.

Cowork can run on a schedule.

a saved task. set the cadence. claude does it while you're not there.

What it does.

inside a cowork project, you can create a task and tell claude when to run it.

every morning at 9am.
every monday.

What you get.

the daily press review sitting in your folder.

the weekly monitor on monday morning.
the monthly client snapshot on the first.

the move from claude as a tool you operate, to a colleague who works in the background while you focus on something else.

When to use Cowork.

three moments when chat in the browser isn't enough.

Too many files for chat.

a folder with dozens of files.
cowork reads them all together.

Files in different places.

notes, emails, slides spread across
folders.
cowork can read them all.

The output is a real file.

a finished document saved in your
folder.

What to take away.

today, in five lines.

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- 01 a project is a saved workspace for any work you keep coming back to. instructions plus files.
 - 02 A few lines of instructions for chat projects. three to five files.
 - 03 shape problem? fix the instructions. content problem? fix the files.
 - 04 memory is who you are. a project is what you're doing.
 - 05 cowork takes projects to your desktop. claude that reads your folders, runs in parallel, and works on a schedule.
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the instructions builder prompt will be shared with you after the session

Questions.

write them in the chat.