

Beyond Prompting

The Claude workflow cheat sheet for knowledge workers

Most AI guides teach you what to type. This one teaches you how to think about the problem differently.

Prompts get you an answer. Workflows get you an hour back. There is a difference, and this guide shows you exactly what it is.

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PART 1 — PROMPT VS. WORKFLOW: WHAT IS THE ACTUAL DIFFERENCE?

A prompt gets you one thing. A workflow gets you a system.

A prompt is a single instruction. You type something, Claude responds, you copy the answer.

A workflow is a repeatable process. You set it up once. Every time you use it, you get a consistent, high-quality output in a fraction of the time.

The difference in practice:

Prompt: *"Write a status report for my project."*

Workflow: A Claude project with your reporting template, role context, past examples, and a 3-step process. Paste your meeting notes. Get a finished report in 8 minutes.

The prompt requires thinking every time. The workflow requires thinking once.

PART 2 — THE FIVE-MINUTE CLAUDE SETUP MOST PEOPLE SKIP

Project memory is the most underused feature in Claude.

Before you build any workflow, set up a Claude Project. This is a dedicated workspace with persistent context. Claude remembers everything you add to it across all conversations.

What to put in your Project Instructions (paste this in verbatim, then edit):

You are helping me with [your role] at [your company]. My job involves [core responsibilities]. The people I work with include [colleagues / stakeholders]. The outputs I produce most often are [reports / briefs / emails / documentation / etc.]. My writing style is [direct / formal / casual / technical]. When I give you raw notes or inputs, do not ask clarifying questions. Give me a complete draft I can edit.

This single setup turns Claude into a context-aware collaborator instead of a blank-slate chatbot.

PART 3 — FIVE WORKFLOWS YOU CAN BUILD TODAY

Each of these takes 15-30 minutes to set up. Each one saves time on the first use.

Workflow 1: Meeting notes to action items

Trigger: End of any meeting with notes or a recording transcript

Instructions: Paste your notes or transcript. Claude extracts decisions made, action items with owners, open questions, and next meeting prep. Output follows a fixed structure you define.

Output: Structured action item list ready to paste into Slack or email

Time: 45 minutes of sorting reduced to 5 minutes

Workflow 2: Draft from a brief

Trigger: Any request to write a document: proposal, report, email, SOP

Instructions: Paste the brief or key points. Claude drafts the full document in your tone using the format you defined in your Project Instructions. You edit the draft, not a blank page.

Output: Full first draft at 80% quality, ready for review and refinement

Time: 2-3 hours of writing reduced to 20-30 minutes

Workflow 3: Research summary

Trigger: Any competitive, market, or background research task

Instructions: Give Claude a question and a list of sources or paste in raw text. Claude summarizes key findings, identifies patterns, flags contradictions, and structures the output by theme.

Output: Structured summary with source references and key takeaways

Time: 4-6 hours of reading and synthesis reduced to 45-90 minutes

Workflow 4: Candidate or vendor evaluation

Trigger: Reviewing CVs, proposals, or vendor responses against criteria

Instructions: Define your scoring criteria in Project Instructions. Paste each candidate or vendor response. Claude evaluates against each criterion with evidence, flags gaps, and produces a structured comparison.

Output: Consistent scorecard across all candidates or vendors

Time: 1-2 hours of review per 10 candidates reduced to 20-30 minutes

Workflow 5: SOP from raw notes

Trigger: Any process that lives in someone's head or in scattered documents

Instructions: Describe the process in rough notes or bullet points. Claude structures it into a complete SOP: steps, decision points, owners, edge cases, and QA checkpoints. You review for accuracy.

Output: Complete, readable SOP document in your standard format

Time: 3-4 hours of documentation reduced to 45 minutes

PART 4 — BEFORE YOU CALL A WORKFLOW DONE

A workflow is ready when these 6 things are true.

- ✓ I can run it start to finish without looking at notes
- ✓ Someone else on my team can run it without asking me questions
- ✓ The output format is fixed and consistent every time
- ✓ I have tested it on at least 3 real examples
- ✓ I know what the failure modes are and what to do when it breaks
- ✓ It saves at least 30 minutes compared to doing it manually

If any of these are not true, the workflow is not done. It is a draft. Keep testing.

PART 5 — THE ONE MINDSET SHIFT THAT CHANGES EVERYTHING

Stop thinking: what can I ask Claude?

Start thinking: which of my recurring tasks should never require human judgment?

The goal is not to use Claude for everything. The goal is to identify the work in your week that is repetitive, document-heavy, or format-dependent. That work does not need you. It needs a system.

Your judgment is worth more on the work that actually requires it.

The teams seeing real results are not using Claude for everything. They are using it for the specific work where speed and consistency matter more than originality.

WHAT NEXT

If you want to build the workflows your team actually uses:

- Workshops: 90 minutes, your team builds one working workflow they use immediately. For teams who want to move fast.
- Workflow Builds: Essen maps your highest-value process and builds the full system. For teams with a specific bottleneck they need fixed.

Both options include a 20-minute discovery call first. No pitch. Just a conversation about your workflows.

Book at: essentrainings.com/book

Prompts are the easy part. Workflows are the hard part. Guess which one everyone else teaches.

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