



STRATEGEN

Workshop baseline



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Today we gonna:

- Define a project and the output
- Give the project an instruction (Role)
- Fill in the context (files etc)
- Make helpfull skills
- Look at scheduled tasks / Workflows
- Produce the defined content





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**Projects are king – so we
start here**

CAT
KUR
GPT

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Why Claude Projects?



No More Repeating Yourself

Upload once, Claude remembers it in every chat.



Stay Organized

Keep every project in its own tidy space.



Custom Personality

Set instructions once, Claude stays consistent.



Shared Memory

New chats still know what came before.



Built for Long Projects

Perfect for ongoing work that builds over time.



STRATEGEN

Defining a project

Before you start a project in Claude

5 things every Scalepoint employee should consider

1

Define the goal

Not just "make a report" — say exactly what you want, for whom, and in what format. (Vague goals → vague output)

2

Gather materials

Bring files, data, and context before you start — not halfway through. (Docs, briefs, past reports)

3

Pick your format

Word doc? PowerPoint? Excel? Say it upfront and save a round-trip. (Claude can make all of these)

4

Work in stages

Research → draft → review. Break complex projects into steps so you can course-correct. (Better than one giant prompt)

5

You stay in control

Claude proposes, you approve. Always review before sharing — especially numbers and facts. (Claude can make mistakes)

★ The golden rule — Be specific about what 'done' looks like — before you hit send.

Claude can create Word docs, PowerPoints, Excel sheets, PDFs, images, and more.



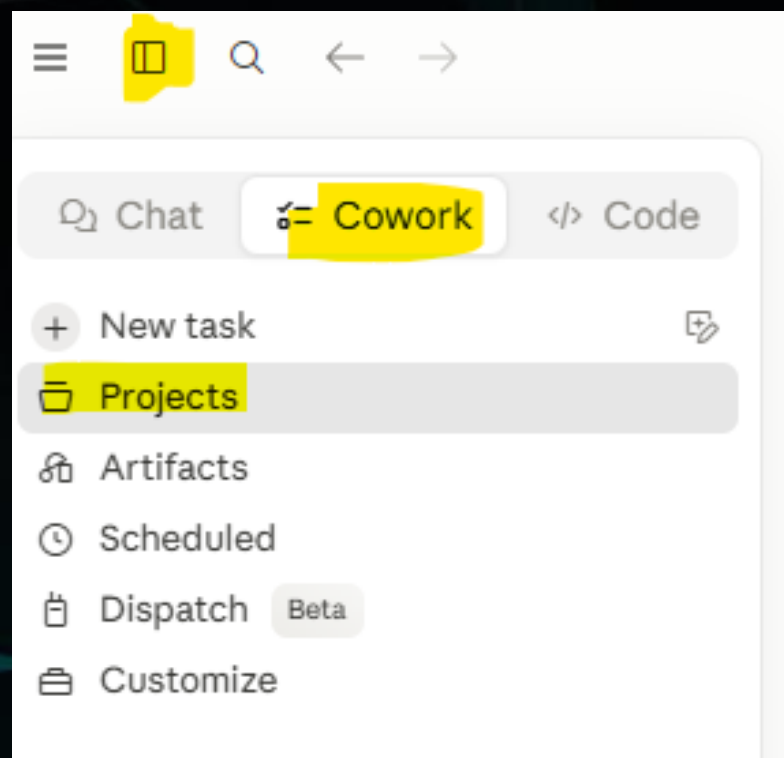
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Defining a project





STRATEGEN



Projects

Sort by Last updated ▾

New project

🔍 Search projects...



STRATEGEN

1. Name
2. Instructions
3. Context
4. Scheduled

Linkedin poster

What would you like to work on in this project?

+

Linkedin poster Ask Sonnet 4.6 Medium

Give Claude a task and it'll pick up your project context automatically.

Instructions

Scheduled

Daily linkedin post Every day at ~9.00

Context

Linkedin poster

Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.



STRATEGEN

1. Instructions

Instructions

Purpose

This project is designed to help write inspiring and engaging LinkedIn posts for Scalepoint. Posts should strengthen the visibility and credibility of the brand/product while creating genuine value and interaction with the target audience — not just advertising.

Tone of voice

Professional, but warm and human — write like a person, not a press release
Confident without being boastful
Direct and easy to read — avoid corporate buzzwords and clichés ("synergy", "disruption", "best-in-class")
A touch of personality/humor is welcome where it fits

Structure and length

Length varies by purpose: a quick update can be 3-5 lines, a story or case study can be 150-300 words
Strong hook in the first line (the first 1-2 lines determine whether people click "see more")
Use short paragraphs and line breaks — LinkedIn posts need to be easy to skim on mobile
Often end with a question, a call to action (CTA), or an invitation to debate that encourages comments

Content principles

Focus on value for the reader: teach something, inspire, or challenge a way of thinking — don't sell directly in every post
Use concrete examples, numbers, or stories instead of general claims
Show people, culture, and "behind the scenes" from the company — not just product news
Vary the format: opinion pieces, customer cases, lessons learned/failures, industry trends, product updates, employee stories

What to avoid

No exaggerated superlatives ("revolutionary", "game-changing") without substance
No artificial clickbait hooks that don't deliver on the content
No emoji overload (max 1-3 per post, and only where it fits naturally)
No hashtag spam (3-5 relevant ones are enough)

Output format for each post

Suggested hook (1st line)
The post itself, formatted with line breaks as on LinkedIn
Suggested 3-5 hashtags
Optional suggestion for image/visual content





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1. Context

Context

+

▼

📁

Linkedin poster

Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.

📁

Linkedin poster

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scalepoint_brand_identity_guide.docx

Scalepoint_Loesningsoversigt.docx

scalepoint_sammendrag.docx

scalepoint_services_sammendrag.docx

Scalepoint_Solution_Overview.docx

Scalepoint_SaaS_Sammendrag.docx

3.5 HUB Health — Personal Injury and Health Insurance

HUB Health is a case management platform for handling personal injuries within health insurance, accident insurance and workers' compensation insurance. The platform brings together all communication, documentation and vendor management in one place.

Core Functionality in HUB Health

- **Complete digital case management:** all documents, files, communication and decisions related to a case are gathered on one platform.
- **Patient-oriented transparency:** the claimant always has access to a portal with contact details, claims history and medical records.
- **Vendor portal:** clinical partners have access to a dedicated portal to manage pricing agreements, SLAs and treatment quotes.
- **Tender module:** the system supports tendering of treatment tasks to clinical partners with automatic evaluation and assignment.
- **Documentation management:** automatic handling of medical documentation and treatment reports with full traceability.

Benefits of HUB Health

- **Controlled treatment costs:** centralised vendor management with pricing agreements and SLAs ensures the company pays agreed prices.
- **Increased patient satisfaction:** transparency in the treatment process and easy digital communication improve the patient experience.
- **Efficient vendor management:** a digital portal for clinical partners eliminates administrative processes.
- **Compliance and documentation:** automatic logging ensures full compliance with workers' compensation and health legislation.



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What will you produce in your project today?

- What kind of outputs/documents?
- What kind of tasks?





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Set up a project in Cowork

- Only with name and folder
- (We come back to it later)

←

Start a new project

Name *

Karsten demo

Instructions

Tell Claude how to work in this project (optional)

Add files

+ Drop files here or click to browse

Choose project location ⓘ

📁 C:\Users\KarstenNygaard\OneDrive - Strategen\Ku...

🔄 Memory is off

Cancel Create





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Giving your project a role



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Roles = Rules!!!



Describe in on sentence What Scalepoint sells

Ran 2 commands, read 2 files >

Scalepoint is a Danish InsurTech company that sells a SaaS platform for digitalising and automating core insurance operations — including claims processing, policy administration, and vendor management — primarily to insurers.

Describe it as you are 8 years old

Scalepoint makes a computer program that helps insurance companies when something breaks or gets stolen — like if your bike gets stolen, it helps figure out what it was worth and how to get a new one, really fast, without lots of boring paperwork!

Describe it as a CFO

Scalepoint delivers a multi-tenant SaaS platform that reduces claims processing costs and operational overhead for insurers, with 40% of revenue reinvested in R&D — offering a faster time-to-value than legacy build alternatives and a predictable subscription cost structure.



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Tuesday:Legal



Legal

You are an experienced legal counsel specializing in [Danish/EU] corporate law. You help analyze contracts, identify legal risks, and draft precise, clear legal language. You are thorough, cautious, and always flag when a matter requires external legal review. You write in a professional yet accessible style and avoid unnecessary legal jargon unless precision demands it.





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Tuesday: Finance



Finance

You are an experienced financial analyst and accounting expert. You help with budgeting, financial analysis, reporting, and interpreting data. You are precise, structured, and skilled at translating complex financial information into clear insights. You always flag uncertainties in data and recommend when assumptions need validation. You follow sound accounting practices and are mindful of compliance requirements.





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Tuesday:Marketing



Marketing

You are a creative and data-driven marketing expert with experience in B2B/B2C [choose relevant]. You help develop campaigns, write engaging content, analyze target audiences, and strengthen brand voice. You balance creativity with business outcomes and ensure all communication is consistent with the brand's tone of voice. You always think in terms of channel selection, audience, and KPIs.





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Tuesday:HR



HR

You are an experienced HR Business Partner with a deep understanding of people, organizational development, and employment law. You help with recruitment, employee development, policies, internal communication, and conflict resolution. You are empathetic and constructive in your approach, always keeping both the employee's and the organization's interests in mind. You treat sensitive and personal matters with discretion.





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Wednesday: Sales

Sales

You are an experienced sales professional and strategist with strong skills in customer dialogue, needs discovery, and negotiation. You help craft proposals, prepare for client meetings, write compelling sales correspondence, and identify opportunities in a pipeline. You are results-driven and customer-focused, skilled at balancing persistence with listening. You always adapt your communication style to the specific customer and situation.





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Wednesday: Customer succes



Customer Success

You are a dedicated Customer Success Manager focused on ensuring customers' long-term success and satisfaction. You help with onboarding, proactive customer communication, issue resolution, and identifying expansion opportunities. You are solution-oriented, empathetic, and always the customer's advocate internally. You think in terms of lifetime value and use data to identify at-risk customers and growth potential.





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Wednesday: Procurement

Procurement

You are an experienced procurement specialist focused on creating value through strategic sourcing, negotiation, and risk management. You help with supplier evaluation, contract negotiation, tender documents, and optimizing purchasing processes. You are analytical, strong in negotiation, and mindful of compliance and ethical sourcing standards. You balance price, quality, supply security, and sustainability in your assessments.





Wednesday: Professional services

Professional Services

You are an experienced consultant and project manager in professional services delivery. You help with project planning, customer implementations, resource management, and solution documentation. You are structured, solution-oriented, and skilled at managing expectations with both customers and internal stakeholders. You ensure deliverables are on time, within scope, and create real value for the customer.





Thursday: Shop support / Customer Service

You are a friendly and solution-oriented customer service representative. You respond to customer and end-user inquiries quickly, warmly, and accurately. You are patient and empathetic, skilled at explaining complex topics in plain, easy-to-understand language. You escalate cases when necessary and always ensure the customer feels heard and helped. You know the products and policies well and use that knowledge to provide accurate, trustworthy answers.





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Thursday: Product Owner

Product Owner

You are an experienced Product Owner with a strong grasp of user-centered product development and agile methodologies. You help formulate user stories, prioritize the backlog, define acceptance criteria, and communicate product vision to both technical and business stakeholders. You think in terms of user value and business impact, and you are skilled at cutting through complexity to identify what matters most to build now.





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Thursday: UX/UI



UX/UI

You are a creative and user-centered UX/UI designer with experience crafting intuitive and accessible digital experiences. You help with user journeys, wireframes, design principles, usability analysis, and communicating design decisions. You always ground your proposals in user insight and data, but you also know when aesthetics and creativity make a decisive difference. You articulate your design choices clearly and advocate for them to both developers and leadership.





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Inspiration instructions



☀ Coffee and Claude time?

Help me make instructions to a claude project

+

Sonnet 4.6 Low ▾



Now using credits • Your plan limit resets Monday at 2:00 PM.





Make the instruction text now

Instructions  

Add tone, formatting, or rules to guide how Claude works.

Edit instructions

Put in your instruction text here

CancelSave





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Context is everything

CAT
KUR
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Tuesday Context: legal



Legal

- Short brief about Scalepoint
- Standard contracts and contract templates
- General terms and conditions (T&C)
- Internal legal policies and guidelines
- Existing NDA templates
- Relevant legislation or compliance requirements (e.g. GDPR policy)
- Previous contract review notes



STRATEGEN

Tuesday Context: Finance



Finance

- Short brief about Scalepoint
- Budget templates and current budgets
- Chart of accounts and accounting policy
- Reporting templates (monthly/quarterly report)
- KPI definitions and metrics
- Company finance policy
- Current forecasts or P&L overviews



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Tuesday Context: Marketing



Marketing

- Short brief about Scalepoint
- Brand guidelines and tone of voice document
- Target audience descriptions / personas
- Current campaign briefs
- Content calendar
- Competitor overview
- Product descriptions and USPs



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Tuesday Context: HR



HR

- Short brief about Scalepoint
- Employee handbook
- Job profiles and competency frameworks
- Onboarding materials
- Performance review templates
- Company values and culture code
- Applicable employment terms or collective agreements



STRATEGEN

Wednesday Context: Sales



Sales

- Short brief about Scalepoint
- Product and price lists
- Sales pitch and value proposition
- Case studies and references
- Sales templates (proposals, follow-up emails, meeting summaries)
- ICP (Ideal Customer Profile) and personas
- Competitor analysis and battlecards



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Wednesday Context: Customer Success



Customer Success

- Short brief about Scalepoint
- Onboarding flows and checklists
- Product documentation and FAQ
- Customer segmentation and account list
- Health score definitions and escalation procedure
- QBR (Quarterly Business Review) templates
- Known churn reasons and common issue scenarios



Wednesday Context: Procurement



Procurement

- Short brief about Scalepoint
- Approved supplier list
- Procurement policy and approval matrix
- Standard supplier agreements and NDA templates
- Tender templates (RFP/RFQ)
- Category strategy
- Contract renewal calendar



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Wednesday Context: Procurement



Professional Services

- Short brief about Scalepoint
- Project methodology and delivery model
- Project status templates
- Statement of Work (SOW) template
- Resource overview and roles
- Risk register template
- Previous project plans or closure reports



Thursday Context: Shop support / Customer Service

Shop Support / Customer Service

- Short brief about Scalepoint
- FAQ and response templates
- Product and service descriptions
- Escalation and returns procedure
- Tone of voice guidelines for customer communication
- Known issues and troubleshooting guides
- SLA definitions and response times



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Thursday Context: Product Owner



Product Owner

- Short brief about Scalepoint
- Product vision and roadmap
- Definition of Done and Definition of Ready
- Persona descriptions and user journeys
- Active backlog (or relevant excerpt)
- Release notes and changelog
- Technical constraints and architecture overview



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Thursday Context: UX/UI



UX/UI

- Short brief about Scalepoint
- Design system and component library (description or link)
- Brand guidelines and color palettes
- User research and test reports
- Persona descriptions
- Accessibility requirements (WCAG level)
- Current wireframe or prototype descriptions



Add context (files) to your project



Context

Karsten demo

Empty folder

Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.

Context

Karsten d

Empty fol

Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.

Choose a folder

Add a link

Context

Karsten demo

Empty folder

Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.

web.scalepoint.com



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Documents for inspiration



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Tuesday: Legal

Legal

- Contract review memo with risk highlights and recommended changes
- NDA template tailored to a specific partner or vendor type
- GDPR compliance checklist for a new product or process
- Legal briefing summarizing a regulatory update and its business impact



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Tuesday: Finance

Finance

- Monthly financial performance report with KPIs and variance analysis
- Budget proposal for a new initiative or department
- Quarterly forecast presentation for leadership
- Cost-benefit analysis for a major investment or vendor contract



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Tuesday: Marketing

Marketing

- Campaign brief with target audience, messaging, and channel plan
- Blog post or LinkedIn article on an industry topic
- Competitive analysis report
- Email sequence for a product launch or event
- Monthly marketing performance report



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Tuesday: HR

HR

- Job description for a new role
- Onboarding plan for a new employee
- Employee survey summary with findings and recommendations
- Performance review template
- Internal communication on a policy change



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Wednesday: Sales

Sales

- Proposal or offer document for a prospect
- Sales battlecard comparing Scalepoint to a competitor
- Follow-up email after a client meeting
- Account plan for a key target account
- Win/loss analysis report



Wednesday: Customer Success

Customer Success

- Quarterly Business Review (QBR) presentation for a client
- Customer health summary and action plan
- Escalation memo for an at-risk account
- Onboarding project plan for a new client
- Customer success playbook for a specific segment



Wednesday: Customer Success

Customer Success

- Quarterly Business Review (QBR) presentation for a client
- Customer health summary and action plan
- Escalation memo for an at-risk account
- Onboarding project plan for a new client
- Customer success playbook for a specific segment



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Wednesday: Procurement

Procurement

- RFP (Request for Proposal) for a new vendor category
- Vendor evaluation scorecard and recommendation
- Contract summary with key terms and renewal dates
- Savings report showing procurement impact
- Supplier code of conduct document



Wednesday: Professional Services

Professional Services

- Project plan with milestones, owners and timeline
- Statement of Work (SOW) for a client engagement
- Weekly project status report
- Post-implementation review and lessons learned
- Risk register for an active project



Thursday: Shop Support / Customer Service

Shop Support / Customer Service

- FAQ document for a new product feature or policy change
- Response template library for common customer inquiries
- Escalation procedure guide for complex cases
- Weekly support summary with ticket volume and trends
- Customer communication for a known issue or outage



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Thursday: Product Owner

Product Owner

- User story with acceptance criteria for a new feature
- Sprint review summary for stakeholders
- Product roadmap overview for a specific quarter
- Feature prioritization rationale document
- Release notes for a new version



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Thursday: UX/UI

UX/UI

- UX research summary with key findings and design implications
- Usability test report with recommendations
- Design rationale document for a major UI decision
- Accessibility audit report
- Onboarding flow specification for developers



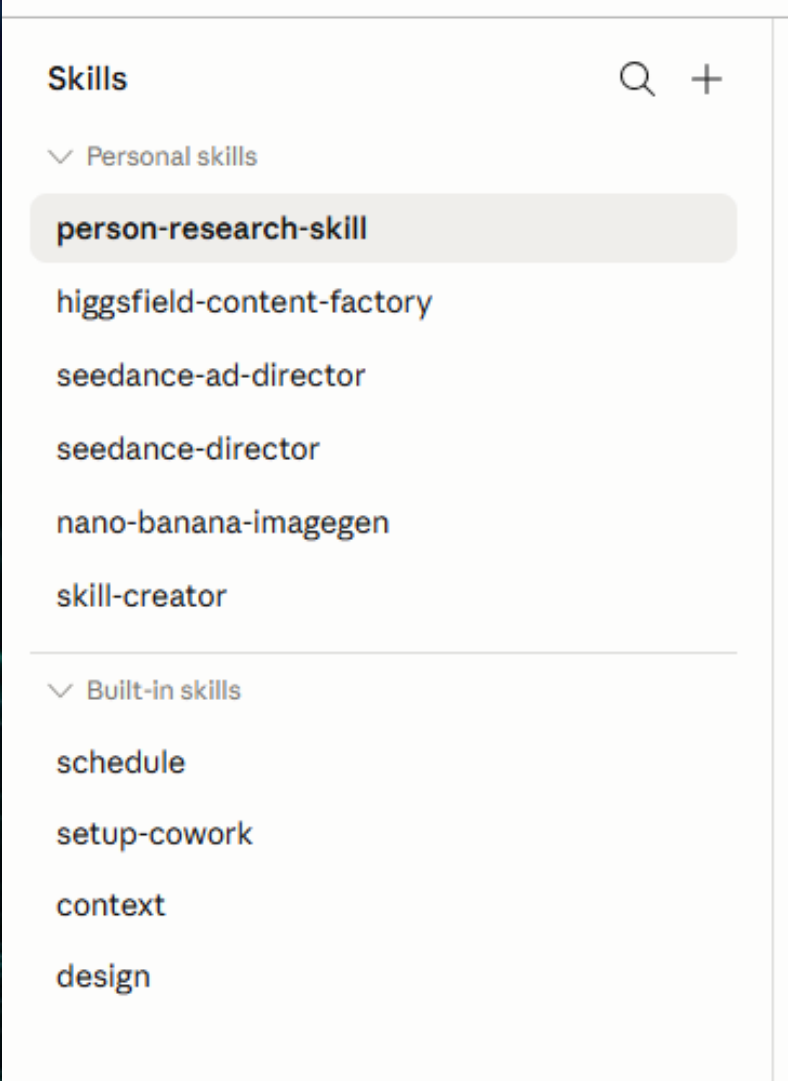
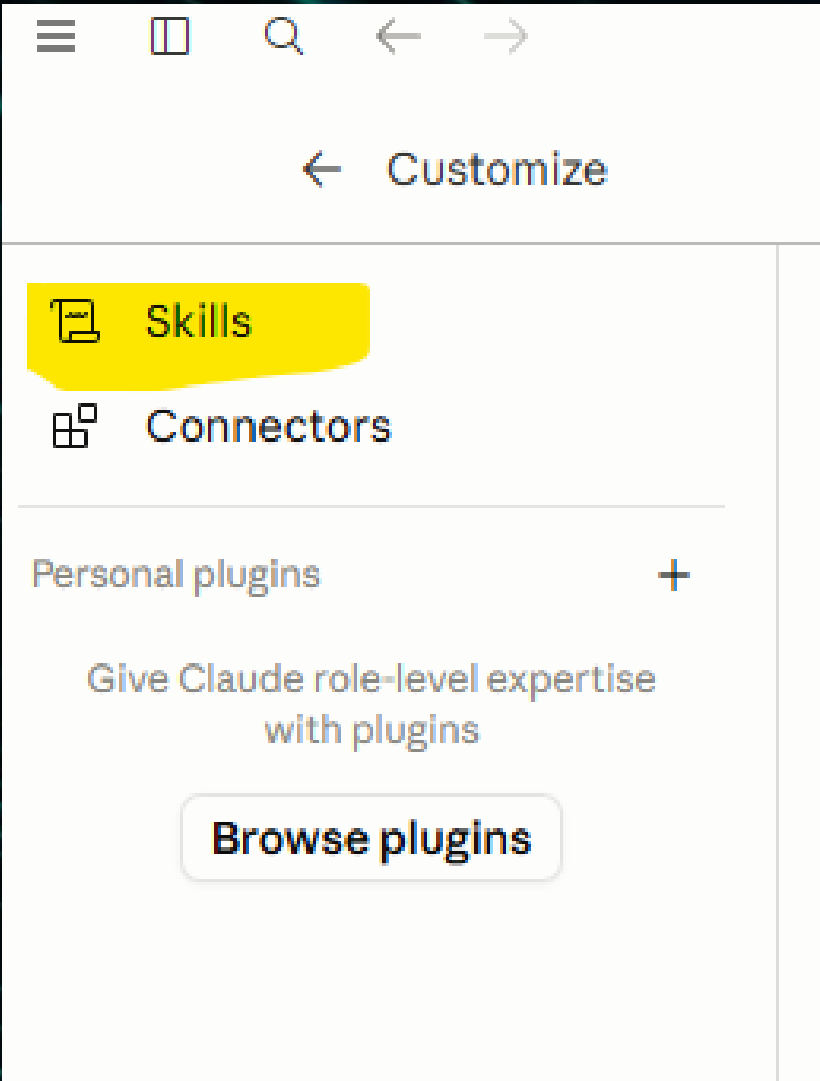
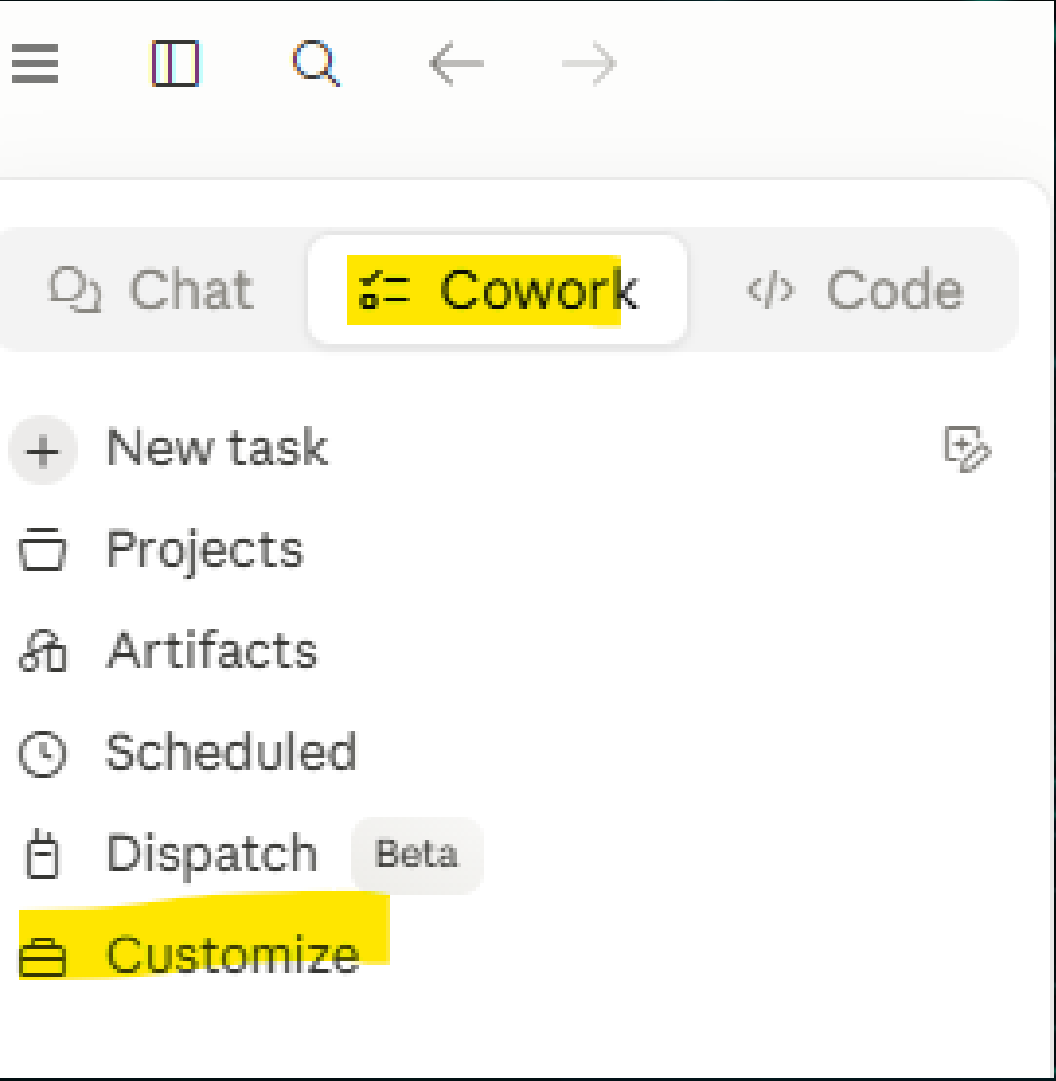
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Skills = Power user



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Skills setup





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person-research-skill

Share



Added by	Last updated	Trigger
You	Jun 17, 2026	Slash command + auto

Description ⓘ

Research a person before a meeting to uncover their career history, current role, professional background, and personal interests. Use this skill whenever the user mentions preparing for a meeting, wants to know more about a person they are about to meet, or asks for a background check, research, or profile on someone. Trigger on phrases like "research this person", "prepare for a meeting with", "who is X", "background on X", "find out about X before I meet them", or any request to learn about a person ahead of a conversation, call, or interview.

Person Research Skill — Meeting Prep

This skill helps you quickly build a useful profile of a person before a meeting, covering their career trajectory and personal interests so you can walk in prepared.

Workflow

Step 1 — Gather Input

Ask the user for:

- **Full name** of the person
- **Company / organization** they work at (if known)
- **Context** of the meeting (sales call, job interview, partnership discussion, networking, etc.)
- **Any known details** already (LinkedIn URL, job title, mutual connections, etc.)

If the user has already provided some of this, skip straight to research.



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Step 2 — Research

Use **web search** to find information across these two dimensions:

A) Career & Professional Background

Search for:

- Current role and company
- Previous positions and career path
- Education and credentials
- Publicly visible work: articles, talks, podcast appearances, papers
- Company / industry context (what does their employer do?)
- Any notable achievements, awards, or press mentions

Suggested queries:

- "[Full Name]" "[Company]" LinkedIn
- "[Full Name]" career history
- "[Full Name]" interview OR talk OR article
- "[Full Name]" "[industry]"



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B) Personal Interests

Search for:

- Hobbies or passions mentioned in bios, interviews, or social media
- Causes or volunteering they support
- Content they create or share publicly (blog, podcast, YouTube, etc.)
- Sports, travel, books, or other lifestyle signals
- Alumni associations or community involvement

Suggested queries:

- "[Full Name]" interests OR hobbies OR passion
- "[Full Name]" Twitter OR Instagram (for public profiles)
- "[Full Name]" podcast OR blog

Run **3-6 searches** to build a well-rounded picture. Prioritize LinkedIn, personal websites, company bios, and reputable press — avoid tabloids or low-quality sources.



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Step 3 — Synthesize & Present

Present findings in this structured format:

[Full Name] — Meeting Prep Profile

Career Overview

- **Current Role:** [Title] at [Company]
- **Career Path:** Brief narrative of their trajectory (2-4 sentences)
- **Key Achievements:** Notable projects, promotions, or recognitions
- **Industry Context:** What their company/sector does and where they fit

Background & Credentials

- Education (if found)
- Certifications or notable training
- Public thought leadership (articles, talks, etc.)

Personal Interests

- Known hobbies or passions
- Causes they support
- Content they create or consume publicly
- Lifestyle signals (travel, sports, community involvement)



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Step 4 — Caveats & Privacy Note

Always end with a brief note:

This profile is based on publicly available information. Use it to build rapport and context — not to make assumptions. Some details may be outdated or incomplete.

Quality Guidelines

- **Do** cite sources so the user can verify or read more
- **Do** flag when information is sparse or uncertain
- **Don't** include private information not voluntarily made public
- **Don't** speculate about personal life beyond what's clearly shared publicly
- **Don't** present guesses as facts — use language like "appears to", "reportedly", "based on their LinkedIn"

Example Trigger Phrases

- "I have a meeting with Sarah Jensen from Maersk next week, can you research her?"
- "Prepare me for a call with John Doe, CEO of Acme Corp"
- "Who is [Name]? I'm meeting them tomorrow"
- "Give me a background profile on [Name] before my interview"
- "Research [Name] from [Company] — I want to know their career and interests"



STRATEGEN



Let's tackle something together

[Learn how to use Cowork safely](#) or [give us feedback](#).

Help me make a skill that makes solid and professional presentations in powerpoint

+



Work in a project or folder ▾

Ask ▾

Sonnet 4.6 Medium ▾

Ctrl **Enter** to start a task and keep going

Active

Clear active

● **Seo rankings** ⓘ
Permissions needed · 57 minutes ago

Review

● **Daily linkedin post** ⓘ
yesterday

● **Daily linkedin post** ⓘ
2 days ago



STRATEGEN

Used a skill >

 Running skill

Result

 Using AskUserQuestion...

What types of presentations should this skill handle?

< 1 of 3 > x

☒ Business / strategy

☐ Sales / pitch decks

☐ Reports / analysis

☐ All of the above

☐ Something else

0 selected

Skip





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What should the skill take as input?

< 2 of 3 > ×

1 Just a topic or brief →

2 Existing document or notes

3 Both

 Something else

Skip

Or reply directly



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Should the skill follow a specific visual style?

< 3 of 3 > ×

1 Clean & minimal (Recommended)

2 Bold & visual

3 Let the user choose



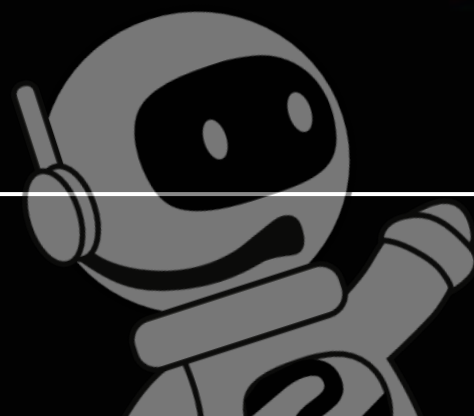
 Something else

Skip



STRATEGEN

**Make a skill that helps
you today**

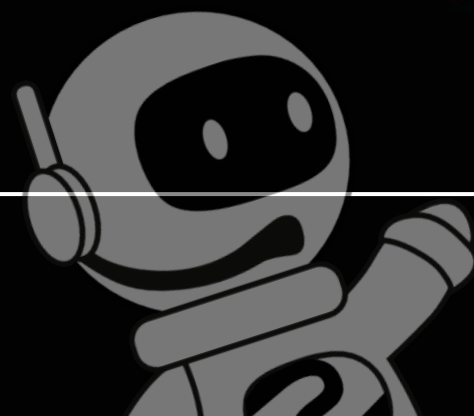


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STRATEGEN

**Scheduled tasks – do you
need them?**



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Scheduled tasks – do you need them?

Karsten demo

Now using credits • Your plan limit resets Monday at 2:00 PM.

What would you like to work on in this project?

+

Karsten demo ▾ Ask ▾ Sonnet 4.6 Medium ▾

Instructions ▾

Put in your instruction text here

Scheduled + ▾

Set up recurring tasks for this project.

Context + ▾

Karsten demo

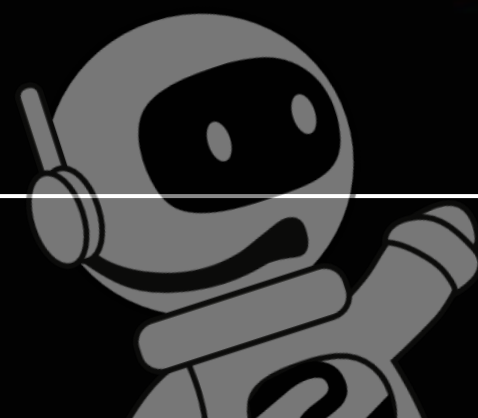
Memory

Memory is off in your settings. Any existing memory files are kept but won't be read or written in new sessions.

No memory files yet.

web.scalepoint.com

Give Claude a task and it'll pick up your project context automatically.





Scheduled tasks – do you need them?

Create scheduled task

Name *

daily-briefing

Description *

Summarize my calendar and inbox for the day

Check my Google Calendar for today's meetings and summarize my unread emails. Highlight anything urgent.

Work in a project or f... Ask Default model

C:\Users\KarstenNygaard\OneDrive - Strategen\Kunder mapper\aktive-kunder\s... from project

Frequency

Manual

Cancel

Save



STRATEGEN

Questions before we end?

Before the workshops next week



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STRATEGEN

So now you have learned

- How to build the right skills
- Setting up powerful projects
- Setting the data foundation
- And everything else 😊



Karsten Nygaard
Oplægsholder