

Claude at Stratus: Quick Reference

Two surfaces, five power features. Chat is Claude in the flow of work. Cowork plans and runs multi-step jobs while you step away. Both live in the Claude Desktop app. Use this page to pick in ten seconds.



THE TWO SURFACES

	Chat CONVERSATIONAL	Cowork DELEGATION AGENT
IN ONE LINE	Claude in the flow of work. Ask, draft, summarize, edit.	Describe an outcome. Claude plans and runs a multi-step job across your files and connected tools.
BEST FOR	Quick questions, drafts, formulas, summaries, one-step assists.	Multi-step jobs you'd otherwise click through across Salesforce, HubSpot, Monday, Teams, Excel, and other tools.
AT STRATUS	• MEDDPICC gut-check on an AE's open deal. • Rewrit [REDACTED] or a QBR talking point. • Write a SOQL query or a Salesforce report formula. • Summarize a 40-message Teams thread [REDACTED]	• Run the daily sync: pull Teams, email, and call transcripts; draft GME tickets. • Generate the CRO Daily Brief and leave it ready to review. • Auto-build a closed-won handoff doc from the Salesforce record. • Pre-event campaign load and ICP scrub [REDACTED]
WHERE TO FIND IT	claude.ai on web, the Desktop app (Chat tab), and mobile. Embedded in Word, Excel, PowerPoint, and Outlook.	Claude Desktop app, middle section.
HOW YOU WORK	You stay in the loop: one message at a time, back and forth.	You delegate: describe the task in plain English, review the plan, let it run.
DATA ACCESS	Connectors (Salesforce, HubSpot, Monday, ZoomInfo, Confluence, M365) via MCP, uploaded files, projects, and web search.	Local folders (with your permission), the same MCP connectors, Claude in Chrome, Excel, and PowerPoint, plus web.
OUTPUTS	Answers, artifacts (docs, HTML, tables), and in-app edits in Word / Excel.	Real artifacts delivered to your files: spreadsheets, reports, decks, created CRM records, drafted (unsent) emails, with approval gates.
HONEST GOTCHAS	Single-step. Won't autonomously execute a multi-step job, and needs connectors set up to touch work data.	Burns usage faster; needs the desktop app open for local files; approval gates can slow you down; web and mobile still in beta.

FIVE POWER FEATURES

These turn Chat and Cowork from a helper into a system.



Connected Tools
THE ACCESS

Claude reaches into Salesforce, M365, ZoomInfo, your call recorder, and the rest, working with live data.

Where: Settings, Connectors. Chat and Cowork share the same connections.

Stratus: Salesforce, HubSpot, Monday, ZoomInfo, Confluence, and M365.

Gotcha: nothing works until a connector is set up and authorized per user.



Skills
REUSABLE PLAYBOOKS

Instructions Claude loads automatically when a task calls for them. Encode "how Stratus does it" once.

Where: claude.ai, Settings, Features. Cowork picks them up through plugins.

Stratus: a closed-won handoff skill, or a MEDDPICC rubric applied the same way every time.

Gotcha: custom skills are per-user on claude.ai; no org-wide admin yet.



Projects
SHARED, PERSISTENT CONTEXT

A space that remembers background knowledge and instructions across chats, so Claude starts up to speed.

Where: Chat (claude.ai and Desktop), Shareable on Team / Enterprise plans.

Stratus: a Territory Model project loaded with the Confluence pages and the region mapping standards.

Gotcha: retrieval-based. Keep it curated and current, not a dumping ground.



Artifacts
DELIVERABLES YOU ITERATE ON

Content built in a side panel you can edit, refine, reuse, and share: docs, tables, dashboards, small apps.

Where: Chat (now shared into Cowork too).

Stratus: the CRO Daily Brief HTML, account battlecards, and this one-pager.

Gotcha: can't save data between sessions on their own. Treat each version as a fresh generation.



Scheduled Tasks
WORK ON A CADENCE

Cowork jobs that run on a schedule, even with your laptop closed. Recurring work happens without you.

Where: Cowork. Type /schedule in any task, or manage under "Scheduled" in the sidebar.

Stratus: the 6 am daily sync that feeds the AI-managed ticketing system in Monday; a Monday-morning CRO Brief refresh.

Gotcha: cadence-based, not event-triggered. Local-file tasks need the desktop app reachable.

USE CHAT

For a **one-step assist** in the flow of work.

USE COWORK

For a job that would take **an hour of clicking**; one ask, done in the background.

ADD A SKILL

When you explain **the same procedure** more than twice.

ADD A PROJECT

When work needs **the same context** every time.

SCHEDULE IT

When a Cowork job runs **every morning** or every week.

