

SCHEDULING RECURRING WORK IN CLAUDE

How to Schedule a Task in Claude

Set the recurring work up once (the morning brief, the weekly digest, the daily sync) and let it run in the background. Three Stratus schedules you can turn on this afternoon.

AUDIENCE

Sales and ops staff

READ TIME

~6 minutes

PREREQUISITES

A paid Claude plan with **Cowork** (*confirm Stratus's plan*)

01 What a Scheduled Task is

A **Scheduled Task** is a Cowork job set to run on a clock (same task, every morning or every Monday) without you kicking it off. You describe the work and the cadence in plain English; Cowork runs it in the background and leaves the output waiting for you.

This is a **Cowork** capability, not a Chat one. Chat is one conversation at a time; Cowork is the delegation agent, and scheduling is what turns a good one-time delegation into standing infrastructure. The daily GME sync you already rely on is exactly this pattern.

NOTE Scheduling pairs with everything else in this set. Point a scheduled task at a **Project** and it runs with full Stratus context every time; have it run a **Skill** and it applies the same procedure on a cadence. Schedule = *when*, Project = *what it knows*, Skill = *how it does it*.

02 When to schedule (and when not to)

- **Schedule it.** The same job needs to happen on a rhythm: a 7 am brief, a Monday pipeline digest, an end-of-day ticket sweep.
- **Just delegate it once.** A one-off multi-step job. Run it in Cowork without a schedule.
- **Don't reach for scheduling when you need event-triggered automation** ("fire the moment a deal hits closed-won"). Scheduling is cadence-based; true event triggers are a different (more technical) build. Keep that distinction honest in any leadership pitch.

03 Set up your first Scheduled Task

- 1 Describe the task and the cadence together in Cowork, or type `/schedule` to start one. Detail helps: sources, format, length, timezone.
- 2 Let Cowork set up the schedule from your description.
- 3 Manage it from the **Scheduled** section in the sidebar. Pause, edit, or delete anytime.
- 4 Decide delivery and approvals. Choose where the output lands. Cowork still asks before anything irreversible (like *sending* an email), so a "draft and send" step may wait for your OK unless you've set trust levels for it.

A scheduled Cowork prompt for a morning sales brief:

```
Every weekday at 7:00 am Arizona time, prepare my sales brief:
```

```
Pull from:
```

- Salesforce: my open opportunities and any that changed stage, amount, or close date in the last 24 hours
- Outlook + Teams: overnight messages from anyone on an active deal
- Calendar: today's meetings with external attendees

```
Produce a one-page brief as an artifact:
```

1. Deals that moved (and how)
2. Anything that went quiet 7+ days
3. Today's calls, with a one-line prep note each
4. The single most important next action

```
Save it to my Daily Briefs folder. Don't send anything externally.
```

TIP Have the task deliver its result **as an artifact**: a clean brief, digest, or HTML page that lands ready to read or hand off. That's how the CRO Daily Brief works. It regenerates on schedule and is waiting each morning, no assembly required.

GOTCHA Two things to plan for. First, tasks that only touch **connectors or the web** run fully hands-off; tasks that need **local files or your browser** need the desktop app reachable. Second, scheduled work **consumes usage** each run. A heavy daily job adds up, so scope it to what you'll actually read.

04 Three Stratus schedules to start from

Each card is a starting point. Edit sources, cadence, and delivery to fit.

01

AE Day-Starter

CADENCE	Daily, 6:30 am.
DOES	Scan your own book: today's meetings with a prep line each, opps closing this week, replies you owe prospects, and deals gone quiet 5+ days.
DELIVERS	A "here's your day" action list, priorities first.

02

Friday Forecast and Hygiene Prep

CADENCE	Weekly, Friday 2 pm.
DOES	The pre-1:1 sweep: catches hygiene gaps (missing next step, stale close date, no activity 10+ days), flags slipping deals, and drafts talking points.
DELIVERS	Talking points ready before the 1:1, so pipeline reviews start from a clean book.

03

Monday Pipeline Digest

CADENCE	Mondays, 7 am.
DOES	Read Salesforce for week-over-week movement: deals advanced, slipped, or gone quiet across the [REDACTED]
DELIVERS	A one-page digest artifact for the team channel, so the weekly sync starts from facts.

END OF GUIDE · Turn on one schedule this week. Start with the report you rebuild by hand every morning.

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