

How it all works together

Four building blocks, two places to use them. This guide ties the set together: what each piece does, how they stack, what you can get done in Chat versus Cowork, and how the team shares it all.

AUDIENCE

Sales & ops staff

READ TIME

~10 minutes

PREREQUISITES

A paid Claude plan;
connectors enabled
(confirm Stratus's setup)

READ FIRST

The four component guides:
[Skills](#), [Projects](#), [Scheduled Tasks](#),
[Connected Tools](#)

01 The building blocks

Four of these are how Claude works; the fifth is what you get back. In one line each:

**Connected Tools**
THE ACCESS

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

**Projects**
WHAT IT KNOWS

The background context (the ICP, the territory model, an account's history) that every chat inside the project starts with.

**Skills**
HOW IT WORKS

The Stratus procedure for a task: the MEDDPICC rubric, the handoff format, our outbound voice.

**Scheduled Tasks**
WHEN IT RUNS

Cowork jobs on a clock, working in the background so recurring work happens without you.

**Artifacts**
WHAT YOU GET OUT

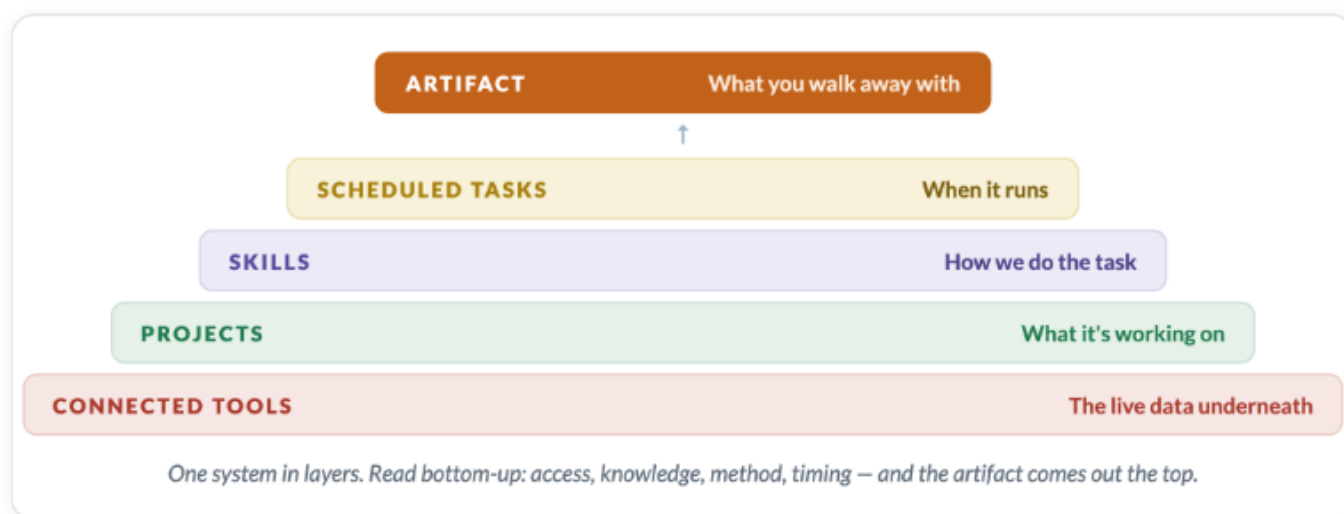
The deliverable Claude builds in the side panel (a brief, battlecard, scored deal, handoff doc) that you refine, keep in the project, and share. It's the output the other four produce.

02 How they stack

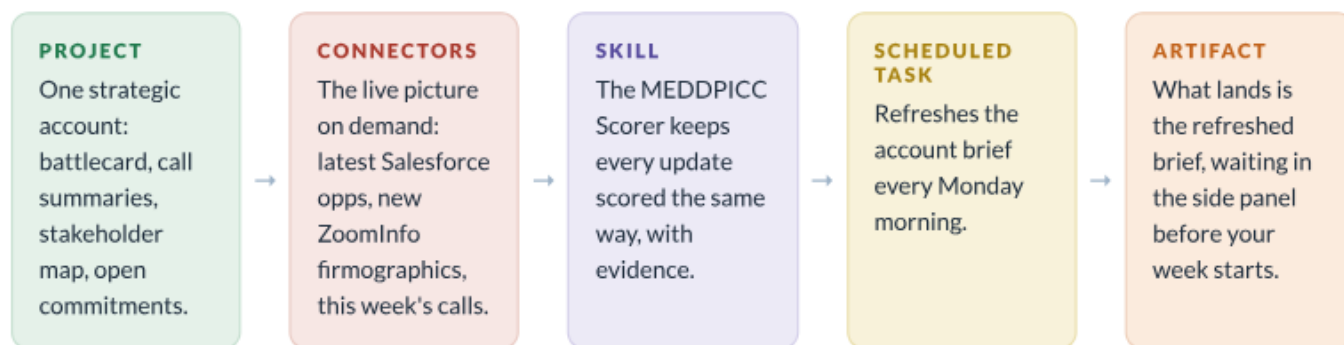
They aren't separate features. They're layers of one system, and they resolve into a deliverable. Read them as a sentence:

Connected Tools give Claude the data • a **Project** tells it what it's working on • a **Skill** tells it how we do the task • a **Schedule** decides when it runs • and it all comes back as an **Artifact** you can use.

You don't need all five for every job. A quick question needs none. But the real leverage comes from stacking them.



A worked example: the Account War Room



One account, all five pieces, no manual assembly. That's the pattern to reach for on anything that matters.

NOTE The **artifact** is the through-line. Most of what you'll build (briefs, battlecards, scored deals, handoff docs) comes back as one, and it's what you refine, keep in the project, and hand off. When you see the orange, that's the thing you actually walk away with.

03 What you can get done in Chat



Chat is Claude in the flow of work. You're in the loop, it's fast, one thing at a time. Best for the moves you make between calls.

Gut-check a deal

Paste your notes: "Score this on MEDDPICC and tell me the weakest spot."

Skill + your notes → scored artifact

Get current on an account fast

"What's the latest on [account]?" pulls recent Salesforce activity, emails, and calls into one summary.

Connectors

Write in our voice

"Rewrite this outbound so it sounds like us and lands the meeting."

Skill

Turn a call into action

Drop in a transcript: "Pull the MEDDPICC updates and draft the follow-up email."

Call intel + Skill

Build a battlecard

"Battlecard for [account]" pulls ZoomInfo + Salesforce + HubSpot into one artifact you keep in the project.

Connectors + Project

Prep a message up the chain

"Draft a three-line Slack update to [redacted] on where the [account] deal stands."

Just ask

TIP Do this work *inside the relevant Project* and every chat already knows your ICP, territory, and account history. You skip the re-explaining and get straight to the ask.

04 What you can get done in Cowork



Cowork is the delegation agent. You describe an outcome, it runs the multi-step job in the background and asks before anything irreversible. Best for the work that eats an hour of clicking.

Start every day pointed at the right work

The AE Day-Starter schedule surfaces today's meetings, closing deals, and owed replies before you sit down.

Schedule + Connectors

Come back from PTO in minutes

"I was out Monday to Friday. Catch me up." It reads email, Teams, and your calendar and hands back a prioritized action list.

Connectors, multi-step

Walk into the 1:1 with a clean book

Assemble a full account package

The Friday Forecast & Hygiene Prep flags gaps and drafts talking points.

Schedule + **Connectors** + **Skill**

"Build me everything on [account] for the QBR": a quarter of activity, calls, and pipeline pulled into one deck or doc.

Connectors → **artifact**

Produce the closed-won handoff

When a deal closes, generate the standardized handoff doc from the Salesforce record.

Skill + **Connectors** → **artifact**

GOTCHA Cowork does the heavy lifting, but it still **asks before sending, publishing, or deleting**, and jobs that touch local files or your browser need the desktop app reachable. Delegation isn't a blank check. You stay the approver.

05 Using it together as a team

The move is to **standardize the *what* and the *how***, and let each person run their own *access* and *timing*.

- **Share Projects to align the team.** On Team and Enterprise plans, a shared Project is the cleanest win going: put the ICP, territory model, and playbooks in one project and everyone works from the same context. No more five versions of the truth. Shared knowledge and instructions are visible to all members, so keep them clean and current.
- **Distribute Skills deliberately.** Custom Skills are per-user on claude.ai; there's no org-wide push yet. To get the team on the same MEDDPICC rubric or handoff format, hand out the skill file (or bundle it into a Cowork plugin) and version it centrally so nobody's running an old copy.
- **Schedules are personal by design.** Each rep runs their **own** scheduled tasks in their own seat. A "team digest" is simply one person's schedule that posts to a shared channel. That keeps everyone's brief scoped to *their* book.
- **Connectors act as each person.** Every connector uses the individual's own login and permissions, so Claude only ever sees what that teammate can see, and writes are attributed to them. Good for governance, and the reason access is set up per person, not once for all.

TIP Rolling this out? Start with **one shared Project** (the ICP), **one shared Skill** (MEDDPICC), and **one schedule per rep** (the Day-Starter). That's a complete loop: shared context, shared method, personal rhythm. It's a half-day of setup, not a project plan.

END OF GUIDE

*The whole system in one sentence: connect your tools, give Claude the context in a **Project**, teach it the Stratus way with a **Skill**, and put the recurring work on a **Schedule**. In Chat when you're in the flow, in Cowork when you want it handled.*

Questions: Ben Marshall, RevOps.