The Friday Client Update

Every Friday at 3 PM, Claude reads the week's client emails and files and drafts 1 short update per client. You check each draft and send it. Setup takes about 10 minutes.

What you need

- The Claude desktop app with Cowork, on a paid plan (Pro, Max or Team)
- The Gmail or Outlook connector, plus Google Drive or SharePoint if client files live there
- A short client list: client name, their email domain, the contact who gets the update, the project

Set it up

STEP	DO THIS
1	Open Claude, go to Cowork and start a new task.
2	Paste your client list into a file called clients.md in the folder Cowork works in, or into a Project if your team uses one.
3	Paste the prompt from page 2. Run it once now on this week's work and check what it gives you.
4	Fix anything it got wrong by adding 1 line to the prompt, then run it again.
5	Make it a scheduled task: every Friday at 3 PM.

What 1 draft looks like

```
Subject: [Client] this week: homepage copy done, launch on 9 Dec

Hi Sam,

Done this week: the homepage copy (link) and the 3 ad variants (link).
In progress: the pricing page, with you on Wednesday 2 Dec.
From you: the final logo files by Monday, so the launch stays on 9 Dec.

[CHECK] The ad budget figure came from an email on 18 Nov. Confirm it.
```

Example draft. Names and dates are made up.

THE PROMPT

Copy this into Cowork

```
Every Friday, draft a client update for each client in clients.md.

For each client:
1. Search my email for threads with that client's email domain from the
   last 7 days. Read them all, including my replies.
2. If the client has a folder in my connected Drive, check which files
   changed in the last 7 days.
3. Draft 1 update email to the client contact with 3 short parts:
   Done this week: finished work, with a link to each file.
   In progress: what is still being worked on and the date it lands.
   From you: anything we are waiting on from the client, with a date.

Rules:
- Under 120 words per client. Plain words. No sign-off fluff.
- Only use facts from the emails and files. Never invent a date,
  a price or a promise.
- If something is unclear, write it anyway and mark the line [CHECK].
- Skip a client if nothing happened this week, and say so.
- Never send anything. Put every draft in 1 document, client by client,
  so I can review and send them myself.

When you finish, list: how many drafts, which clients were skipped,
and every [CHECK] line.
```

Make it fit your agency

IF YOU WANT	ADD THIS LINE TO THE PROMPT
Slack updates instead of email	`Write each update as a Slack message under 80 words.`
Hours on each update	`Add hours logged this week from timesheet.csv.`
A summary for you first	`Start with 3 lines on which client needs attention and why.`
Your tone	`Match the tone of my last 5 sent emails to this client.`

For the whole team

This is 1 of the automations in Claude at Work: Team Kit. The kit gets a team of 5 to 50 running 1 automation each in their first week, with a rollout plan, 4 guides and a shared Project setup. See it at theusefulmedia.com/team.