THE AI EMPLOYEE ONBOARDING PLAN

hire Claude for one job this week — Claude Cowork's “Record a Skill”

STEP 1 — PICK THE JOB

Choose one task that happens at least weekly, takes 10+ minutes, has if-this-then-that decisions in it, and whose rules exist only in your head. If you can describe the whole task in one sentence, it's a prompt, not a skill — pick something with more moving parts. The list at the back has 100+ ideas by category.

STEP 2 — SET UP THE DESK

Put everything the job touches into one folder: templates, trackers, and one finished example of the output done right — Claude learns from what “good” looks like, the same way a new hire does. Log in to every tool the job uses. Then do one 30-second throwaway recording first, purely to clear the screen and microphone permission pop-ups.

STEP 3 — RECORD THE TRAINING

Claude desktop app → + menu → Record a skill. Do the job once, normally, and narrate like you're training a new hire sitting next to you. Your voice should cover five things as they come up naturally:

- **The trigger** — what event kicks this job off
- **The rules** — what you always do, and why
- **The branches** — “if it's this type, I do X; if it's that type, I do Y” — say every branch out loud, even the paths you don't show on screen
- **The guardrails** — what you never do
- **The quality bar** — how you know it's done right

Narrate the why, not the click — Claude can already see your clicks. Keep it under 5 minutes: do 3–4 examples, not the whole batch, then stop and save. (Part 2 has three of these narrations written out word-for-word.)

STEP 4 — RUN THE PROBATION TEST

Re-run the skill on a fresh example — one that never appeared in your recording. Check the judgment, not just the output: did it apply your rules, or copy your example? Ask it why it made a choice — it should hand your own reasoning back to you. If something's off, edit the skill's instructions directly, or re-record and say the missed rule out loud this time.

STEP 5 — PUT IT ON PAYROLL

The skill lives under Customize → Skills — name it by its trigger (“New client signed”). Run it on real work this week and review the output until you trust it. Then the compounding move: one new skill per week. That's 50 documented, self-executing SOPs a year.

PART 2 — THREE RECORDINGS, WRITTEN OUT WORD-FOR-WORD

Steal these. Each one is a complete narration — read it aloud (in your own words is fine) while you do the task on screen. Swap the specifics for yours.

EXAMPLE 1 — CLIENT ONBOARDING

On screen: your client folder, contract templates, welcome email template, client tracker. Have one existing client's folder visible as the pattern.

> *“Whenever a new client signs, this is my process.”*
>
> *“First I create their folder — same structure as every other client: contract, assets, deliverables, reports.”*
>
> *“This one's a retainer client, so they get the retainer contract with monthly terms. If it were a fixed project, I'd use the project contract with milestone payments instead.”*
>
> *“The welcome email always opens with their goal, not our process — and I always propose a kickoff call within five business days.”*
>
> *“Then they go in the tracker: type, fee, start date, contact. Status starts as Onboarding.”*
>
> *“It's done when the folder, signed contract, sent email, and tracker row all exist. I never invoice before the contract is signed.”*

Test it with: “New client signed — details in [file]. Run my client onboarding.” Use a client of the type you didn't show.

EXAMPLE 2 — APPLICANT / LEAD SCREENING

On screen: a folder of applications or leads, plus Yes / Maybe / No folders or a shortlist sheet.

> *“Whenever new applications come in, I screen them in one batch.”*
>
> *“No portfolio or work samples — that's an instant no. I don't care how good the CV reads.”*
>
> *“I hire for shipped work, not job titles. Junior but the work is real — that's a maybe.”*
>
> *“If they're clearly overqualified, that's a maybe, not a yes — I flag the salary risk in my note.”*
>
> *“Every candidate gets a one-line verdict in the sheet — that's what I read later, not the CV.”*
>
> *“It's done when every file is in a folder and every row has a verdict. I never reply to anyone at this stage.”*

Test it with: “New applicants are in the folder — screen them.” Then ask: “Why did you pass on [name]?” — the answer should be your criteria.

EXAMPLE 3 — VIDEO → THREAD REPURPOSING

On screen: one video transcript, one or two of your best past threads open as the reference for what good looks like.

> *“Every time a video goes live, it becomes a thread. Here's how.”*
>
> *“The first line is the hook — never a question, and the number or result goes in line one.”*

"One idea per tweet. If a tweet has two points, it becomes two tweets."

"I write like I talk — no hashtags, no 'thread below', no corporate phrasing."

"These two past threads are the bar — this rhythm, this density."

"It's done at 8 to 12 tweets, ending with one clear call to action, never two."

Test it with: "New video transcript attached — turn it into a thread." Judge it against your last good thread, not against perfect.

PART 3 — 100+ JOBS YOU CAN HIRE CLAUDE FOR

Every one of these passes the test: recurring, multi-step, judgment involved. Find your category, pick the one you dread most, start there.

CLIENTS & SALES

- Client onboarding — signed deal to folders, contract, welcome email, tracker
- Proposal / quote generation — brief in, priced proposal out, your rules applied
- Lead qualification — inbound sorted hot / warm / cold with your disqualifiers
- Sales call follow-up — CRM updated, recap drafted, next step logged
- Cold outreach personalization — your research-then-write process per prospect
- Monthly client reports — raw exports into your format, framed your way
- Renewal check-ins — usage reviewed, renewal email drafted at the right week
- Case study assembly — results pulled, quotes selected, your narrative arc
- Pipeline review — stale deals flagged, next actions proposed per stage
- Client offboarding — archive, final invoice, handover doc, testimonial ask

MARKETING

- Campaign brief creation — objective to full brief in your house format
- Ad copy variants — your hooks, your compliance rules, your banned phrases
- Email campaign assembly — sequence built from your past best performers
- Landing page copy review — your conversion checklist applied section by section
- Competitor ad monitoring — their new angles logged weekly into your tracker
- Brand voice QA — any draft checked against your voice rules before it ships
- Launch checklist runs — every channel, every asset, verified pre-launch
- UTM and link hygiene — naming conventions enforced across every campaign

HIRING & TEAM

- CV / applicant screening — yes / maybe / no with a one-line verdict each
- Interview debriefs — raw notes into your scorecard, signals weighted per role
- New-hire onboarding packs — day-one docs, access lists, first-week plan by role
- Freelancer briefs — detailed enough to kill revision rounds
- Performance review prep — the quarter's evidence gathered into your template
- Weekly 1:1 agendas — open items, wins, blockers pulled into your format
- Handover docs — departing teammate's work mapped before their last day
- Role scorecards — new position defined in your hiring framework

FINANCE & ADMIN

- Invoice reconciliation — invoices vs bank statement, mismatches flagged
- Expense categorization — statements sorted with your personal-vs-business calls
- Overdue invoice chasing — your escalation ladder, tone shift per stage
- Subscription audits — keep / cancel / downgrade calls on every recurring charge
- Payroll pre-checks — hours, rates, and anomalies verified before running
- Monthly P&L; summaries — the numbers narrated the way you read them
- Receipt filing — named, foldered, and logged your way
- Budget variance notes — actual vs plan, flagged at your thresholds
- Vendor comparisons — quotes normalized into your decision format

CONTENT & CREATOR

- Video-to-thread repurposing — transcript to finished thread in your voice
- Competitor outlier scans — overperformers logged vs channel average
- Outlier reverse-engineering — hook, structure, and the gap you can fill
- Newsletter assembly — the week's content into an issue, your curation bar
- Show notes and chapters — transcript to notes, chapters, SEO description
- Comment mining — comments into an idea bank, demand signals only
- Sponsorship triage — brand-fit rules, floor price, red flags, counters
- Shorts scripting — long-form cut into your short-form structure
- Title and thumbnail briefs — options generated inside your proven formulas
- Content calendar slotting — ideas placed by lane, season, and gap
- Podcast guest research — their story mined for your question style
- Community post drafting — announcements in your voice, your cadence

OPS & RESEARCH

- Weekly metrics scorecards — your exports into your dashboard, annotated
- Meeting prep briefs — person, company, history into a one-pager pre-call
- Industry news digests — your sources, your signal-vs-noise filter
- Contract redline first pass — your standard positions marked (lawyer still reviews)
- Deliverable QA — the checklist in your head, run before anything ships
- SOP updating — process changes written into your doc structure
- Project post-mortems — what happened, in your retro format
- Weekly team updates — everyone's threads compressed into your update
- Tool and vendor research — options evaluated against your criteria

SUPPORT & CUSTOMERS

- Ticket triage — sort, draft, escalate, with your refund thresholds
- Review responses — tone by star rating, take-it-offline rules
- Refund decisions — your policy applied case by case, edge cases flagged
- FAQ updating — recurring tickets turned into documented answers
- Churn-risk flagging — the warning signs you watch for, watched always
- Customer onboarding emails — sequence personalized per account type
- Escalation summaries — messy threads compressed for whoever's next

E-COMMERCE

- Product listings — supplier info to listing: title formulas, photo order
- Price monitoring — competitor prices checked against your reprice rules
- Reorder flagging — stock levels vs your lead times and thresholds
- Supplier emails — orders, disputes, and chasers in your negotiating tone
- Return processing — your decision rules applied, fraud patterns flagged
- Listing refreshes — stale descriptions rewritten inside your keyword rules
- Marketplace review sweeps — new reviews triaged across every channel

COACHES & CONSULTANTS

- Discovery call prep — prospect researched into your pre-call sheet
- Session notes to action plans — your debrief format, sent same day
- Program onboarding — new client into your systems, sequence started
- Testimonial collection — the ask timed and worded your way
- Curriculum updates — module content revised in your teaching structure
- Weekly check-in drafts — progress reviewed, nudge written per client

DEVELOPERS & TECHNICAL

- PR review first pass — your checklist: naming, tests, the mistakes you always catch
- Bug triage — severity and ownership assigned by your rules
- Release notes — merged PRs summarized for humans, in your format
- Standup summaries — commits and tickets compressed into your update
- Incident post-mortems — timeline, cause, actions in your template
- Dependency audits — outdated and vulnerable packages flagged your way
- Environment setup docs — kept current every time the stack changes

REAL ESTATE & LOCAL BUSINESS

- Listing descriptions — property details into your listing voice and structure
- Appointment prep packs — client history and property comps before every showing
- Quote follow-ups — your chase cadence and tone, per job type
- Review requests — the ask sent at your moment, in your words
- Intake processing — new enquiry forms into your CRM, qualified by your rules
- Local competitor checks — pricing and offers monitored on your schedule

LEGAL & COMPLIANCE ADMIN

- NDA first pass — reviewed against your standard positions (lawyer still signs off)
- Contract comparisons — new agreements diffed against your template terms
- Compliance checklist runs — your regulatory checklist applied per project
- Policy doc updates — process changes reflected across your policy set
- Deadline tracking — filing and renewal dates logged with your lead times

PERSONAL PRODUCTIVITY

- Inbox triage — your reply / delegate / archive rules, applied in batches
- Weekly planning — calendar and task list shaped into your ideal week
- File and folder cleanup — downloads and desktop sorted your way

- Reading digests — saved articles summarized in your preferred depth
- Travel prep — bookings, itinerary, and packing list per your preferences
- Bill tracking — due dates logged, anomalies vs last month flagged
- Weekly reviews — wins, misses, and next week in your journaling format

A new hire takes weeks to ramp and forgets things.
This one ramps in an afternoon, works at 2am, and remembers everything.

— Miles Deutscher