

20-MINUTE SETUP · ONE TIME · RUNS ITSELF AFTER

Make Claude run your morning.

Connect your Outlook, SharePoint and calendar once. Every weekday before your first meeting, Claude reads what came in overnight and hands you a brief: what changed, what needs you, and what to decide — generated automatically from the systems you already use.

THE ROADMAP

01

Get the two tools

5 MIN

A **Claude Pro** plan and the **Claude Desktop** app. Scheduling needs both — this is the only paid step.

02

Connect Microsoft 365

5 MIN

In Claude: **Connectors** → **Microsoft 365**, sign in with your **work** account. Read-only — Claude sees only what you already can.

03

Add the brief

2 MIN

Open Cowork, start a new task, and paste the **prompt below**. That prompt is the whole product.

04

Put it on a schedule

3 MIN

Type `/schedule`, set **7:30am**, **weekdays**. Claude now writes the brief before you wake up.

05

Read it anywhere

DAILY

Open the brief on your phone via **Dispatch** and ask follow-ups on the walk to your first meeting.

THE 7:30 BRIEF

MONDAY · MORNING BRIEF

INBOX

3 emails need a reply from you

ACTION

CALENDAR

5 meetings · 2 need prep

TODAY

SHAREPOINT

2 client files changed overnight

REVIEW

TO-DO

6 items, prioritised for today

READY

THINKING POINTS

2 decisions worth sitting with

DECIDE

SOURCE: MICROSOFT 365

90-SEC READ

This is the shape of the output — the prompt below produces a brief like this from your own activity.

WHO RUNS THIS

Financial-services leaders — principals, advisers, brokers, partners. Built for the FS day; works for **any Microsoft 365 executive**.

THE PROMPT — PASTE INTO A COWORK TASK

COPY VERBATIM

You are my chief of staff. Each weekday at 7:30am, use my Microsoft 365 connector to write my Morning Brief: (1) the last 24h of email — flag anything urgent, client-related, or awaiting my decision, with who it's from and what they need; (2) today's calendar with a one-line prep note per meeting and which ones actually need prep; (3) SharePoint / OneDrive files changed or shared with me since yesterday that matter; (4) a prioritised to-do list for today — on Mondays, add a one-page plan for the week; (5) two or three strategic **thinking points** — decisions or risks I should be sitting with. Keep it skimmable in 90 seconds. End with a single line: **what changed since yesterday**.

REQUIREMENTS

Claude **Pro** or higher · the **Desktop** app · a Microsoft 365 **work** account (personal Outlook.com won't connect).

GOOD TO KNOW

Scheduled tasks run while the Desktop app is open. If it's closed at 7:30, the brief runs the moment you next open it — so leave it running.

DATA & COMPLIANCE

Claude accesses only what **you** already can. M365 data is processed on Anthropic's servers — for client or regulated data, confirm your firm's data-governance sign-off first.