

SETUP GUIDE · 20 MINUTES · ONE TIME

Install the Brief.

A complete walkthrough for installing the Executive Morning Brief skill into your Claude Desktop and connecting it to Microsoft 365 — so a finished brief is waiting in your inbox before your first meeting, every weekday.

Inside this package

- MD** **SKILL.md**
The skill file Claude reads — do not edit.
- PDF** **Setup_Guide.pdf**
This document.
- TXT** **README.txt**
Quick install reference, 5 lines.
- EX** **examples/sample-brief.txt**
What the daily output looks like.

Before you start

- Claude Pro (or higher) plan**
Scheduling and skills both require a paid plan.
- Claude Desktop app**, installed and signed in
The web app cannot run scheduled tasks.
- Microsoft 365 work account**
Personal Outlook.com accounts do not connect.

What you'll have, 20 minutes from now

- **A daily brief** written automatically at 7:30am every weekday.
- **Email triage** — only the messages that need you, with what they want.
- **Meeting prep** — a one-line note for every meeting today, with which ones need real prep.
- **File changes** — SharePoint and OneDrive activity that matters.
- **Thinking points** — 2–3 strategic items the data surfaces for you.
- **Readable in 90 seconds**, on your phone, before your first meeting.

THE INSTALL · 5 STEPS · ~15 MINUTES

Get the skill running.

Follow these in order. Each step shows what to do, where to do it, and a green checkmark line telling you what you'll see when it's worked.

01

Open Claude Desktop and confirm your plan

Open the **Claude Desktop** app (not the browser). In the bottom-left, click your profile → **Settings** → **Plan**. You need **Pro** or higher — scheduling and skills both require it. If you are on Free, upgrade now before continuing.

✓ Your profile menu shows "Pro" (or Team / Max).

02

Turn on Code Execution & File Creation

Still in Settings, go to **Capabilities**. Toggle on `Code execution and file creation`. This is the single most common reason skills fail to appear — if this is off, Claude will not load your skill.

✓ The toggle reads "On" with a blue indicator.

03

Install the skill

In Cowork, look at the left sidebar and click **Customize**. Click the `+` button to open the directory, then the **Skills** tab.

Choose **Upload**, and select the **executive-morning-brief** folder you unzipped — the whole folder, not just the SKILL.md file. Toggle the new skill **On**.

✓ "Executive Morning Brief" appears in your sidebar, toggled on.

04

Connect Microsoft 365

Open **Connectors** in the same sidebar, find **Microsoft 365**, and click **Connect**. Sign in with your **work** Microsoft account — not a personal Outlook.com address. Approve the read-only permissions for Outlook, Calendar, SharePoint, and OneDrive. Claude can only see what you can already see in M365 — this connector adds no new access.

✓ Microsoft 365 shows "Connected" with your work email under it.

05

Test, then schedule

Start a new Cowork task and type `morning brief`. Claude should recognise the skill and produce a brief from your

real activity in 20–40 seconds. Once you're happy, type `/schedule`, set it to run at **7:30am, weekdays**, and confirm.

From tomorrow morning it runs on its own — as long as the Desktop app is open at that time. If it's closed, the brief runs the moment you next open it.

✓ A scheduled task labelled "Morning Brief" appears in your Cowork sidebar.

RUNNING, TROUBLESHOOTING, CUSTOMISING

What good looks like.

YOUR FIRST RUN

- 01 Open a new Cowork task and type morning brief.
- 02 Claude pulls from M365 — expect a 20–40 second wait the first time.
- 03 The output should match the shape on the right. If sections are missing, your M365 permissions are partial — reconnect.
- 04 Ask a follow-up: "draft a reply to [sender]" or "block prep time for the 10am".
- 05 When you're happy with one manual run, schedule it (Step 5 of the install).

MORNING BRIEF · MONDAY

INBOX

Sarah Chen — wants the revised SoA before tomorrow.
David Park — sign-off needed on Q2 attestation.

CALENDAR

10:30 Meridian review — **PREP**
 13:00 Lunch w/ Tom Briggs — **DECISION**

PRIORITIES

Sign Q2 attestation. Read SoA before 10:30.

What changed since yesterday: Sarah delivered the SoA overnight — the 10:30 is now a closing conversation.

IF SOMETHING IS NOT RIGHT

| SYMPTOM | CAUSE | FIX |
|--------------------------------------|-----------------------------------------|-----------------------------------------------------------------------------------------------------|
| Skill does not appear in the sidebar | Code execution & file creation is off. | Settings → Capabilities → toggle it on. Restart Claude Desktop. |
| "Cannot access Microsoft 365" | Connector signed out, or token expired. | Connectors → Microsoft 365 → Disconnect, then Connect again with your work account. |
| Scheduled brief did not run | Desktop app was closed at 7:30am. | Open Claude Desktop — the brief runs immediately. Leave the app running overnight to avoid the gap. |
| Brief is sparse or empty | M365 permissions are partial. | In M365 admin, confirm Mail, Calendar, SharePoint, and OneDrive are all granted — not just Mail. |

MAKE IT YOURS

CHANGE THE TIME

Run earlier, later, or twice

In Cowork, open the scheduled task and edit. Try **6:30am** if you commute, or add a **4:30pm** end-of-day version.

CHANGE THE SHAPE

Add or remove sections

Tell the running task: "skip the thinking points on routine days" or "add a section for pipeline movement".

CHANGE THE TONE

Your voice, not ours

Reply once with: "keep this terse — no full sentences, just facts". Claude carries the tone forward.



COMPLIANCE REMINDER

Claude can only access what **you** already can in Microsoft 365 — this skill adds no new access. Your M365 data is processed on Anthropic's servers when the brief runs. If your firm holds **client or otherwise regulated data**, confirm with your privacy or compliance lead that this is acceptable under your data-governance policy before scheduling.