



To discuss this course and customizations:
Call: +1 434-509-6890 or Email: sales@cloudcontraptions.com

Building Agents with Claude

Class Duration

7 hours of live training delivered over 1-2 days to accommodate your scheduling needs.

Student Prerequisites

- Comfort with everyday office software: documents, spreadsheets, email, and a web browser
- Basic experience chatting with an AI assistant is helpful but not required
- No technical background or programming experience required

Target Audience

Business users and team leads who want to build their own custom AI assistants with Claude: operations, HR, finance, marketing, sales, legal, support, and management. Ideal for teams standardizing on Claude who want reusable, purpose-built assistants grounded in their own documents and ways of working. No technical background is assumed, and nothing in the course requires one.

Description

This practical, hands-on course teaches business users how to build their own custom assistants with Claude, no programming required. Participants learn how Claude works, then build reusable assistants using Projects that combine custom instructions with a body of trusted knowledge. The course covers writing instructions that shape how an assistant behaves, adding uploaded documents as knowledge, packaging repeatable know-how as Skills, and using connectors so an assistant can work with current information and other tools. Testing, verification, and responsible use receive close attention: refining an assistant until it is dependable, checking its output, protecting sensitive data, and sharing an assistant with a team. Every topic is practiced against realistic workplace scenarios so participants leave able to build, refine, and share useful assistants right away.



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Learning Outcomes

- Explain in plain language how Claude works and where it is strong or weak.
- Create a reusable assistant with a Claude Project that combines instructions and knowledge.
- Write clear custom instructions that shape an assistant's role, tone, and scope.
- Add uploaded documents as trusted knowledge and keep them current.
- Package repeatable know-how as a Skill an assistant can reuse.
- Use connectors and tools so an assistant can reach current information and other systems.
- Test and refine an assistant, verifying its answers against its sources.
- Protect sensitive and confidential information when building and sharing assistants.
- Share an assistant with a team and establish shared practices for using it.

Training Materials

Comprehensive courseware is distributed online at the start of class. All students receive a downloadable MP4 recording of the training.

Software Requirements

Students need access to Claude through a Claude account or their organization's Claude for Work plan, and a web browser. No installation required.

Training Topics

Understanding Claude as an Assistant

- What Claude is and how it generates responses, in plain language
- What Claude does well: language, reasoning, and long documents
- Where Claude falls short: facts, arithmetic, and recent events
- Chat versus a reusable, purpose-built assistant
- Everyday scenarios where a custom assistant helps

Building with Projects

- What a Project is and when to create one

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- Combining custom instructions with a shared body of knowledge
- Organizing work so a team draws on the same assistant
- Naming and describing a Project so others understand it
- Previewing and using a Project in daily work

Writing Custom Instructions

- The anatomy of clear instructions for an assistant
- Defining the assistant's role, scope, and boundaries
- Setting tone, audience, and response format
- Handling questions outside the assistant's purpose
- Refining instructions based on how the assistant responds

Adding Knowledge

- Uploading documents as trusted knowledge
- Choosing which sources belong in an assistant
- Keeping knowledge accurate and up to date
- How grounding reduces made-up answers
- Checking answers against the underlying documents

Packaging Know-How as Skills

- What a Skill is and how it captures repeatable work
- Turning a proven process into a reusable Skill
- Combining Skills with instructions and knowledge
- When a Skill is a better fit than a one-off prompt
- Maintaining Skills as your processes change

Connectors and Tools

- How connectors let an assistant reach beyond a conversation
- Using web search for current information
- Connecting approved data sources and tools
- Understanding what a connector can access on your behalf
- Reviewing results before relying on them

Testing, Verification, and Responsible Use

- Trying an assistant against realistic questions
- Recognizing made-up answers and checking sources
- Matching the depth of checking to the stakes of the task
- Protecting customer, employee, and company data



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- Working within your organization's AI and data policies

Sharing and Team Practices

- Sharing an assistant with a team
- Gathering feedback from the people who use it
- Keeping instructions, knowledge, and Skills maintained
- Building a shared library of assistants that work
- Staying current as Claude's capabilities change