STRETCHLEARN · WORKBOOK

Claude for Research & Analysis — Workbook

This workbook turns the course into a working research system you actually use: a configured Claude Project, a source library, grounded summaries, a synthesis matrix, a competitive feature matrix, and a decision brief. Work through one section per module, running the prompts in Claude.ai as you go and filling each worksheet. By the end you will have a reusable Project and a set of templates that make every future investigation faster and more defensible.

Setting Up Claude as a Research Tool

Stand up a Project, pick your model and surface, and lock in the Role-Sources-Task-Format-Constraints prompt habit everything else depends on.

Worksheet: Model and Surface Decision Sheet

Fill this out for the next real research task you have. It forces you to choose deliberately instead of defaulting to a throwaway chat. Keep it next to Claude as a reference until the choices become automatic.

Research task in one sentence

Will I revisit this over days? (yes = Project, no = single chat)

Chosen surface (single chat / Project / Artifact)

Chosen model and why (Sonnet to draft / Opus for final synthesis / Haiku for quick passes)

Access tier I am on (Free / Pro / Team)

Documents I will need to load

Exercise: Write One Research Prompt With the Full Framework

Pick a single document you need analyzed this week. Draft one prompt that fills all five parts of Role-Sources-Task-Format-Constraints. Run it in Claude, then refine twice in the same chat instead of starting over. Save the working version to your prompt library.

• Write the Role and Sources lines: who Claude should be, and the exact material it may use.

• Write the Task (one verb, one deliverable) and the Format (named columns, word count, or structure).

• Write the Constraints: cite sources, flag uncertainty, do not speculate, length cap.

• After the first output, write one refinement instruction that fixes the weakest part of the answer.

Checklist: Project Setup Checklist

[ ] Confirm you are on Claude Pro or higher so Projects is available
[ ] Create a Project named Research Lab
[ ] Paste standing custom instructions: cite sources, never invent facts, flag uncertainty, prefer tables
[ ] Save 4 starter prompts (summary, extraction, synthesis, comparison) into a pinned note
[ ] Confirm you know how to switch the model between Sonnet and Opus in the picker

Deep Research and Long-Context Synthesis

Load a real document set, confirm Claude received it, synthesize across all of it, and verify the load-bearing claims with quote-backs.

Exercise: Run the Inventory-First Habit

Upload three to five related documents into a Project or chat. Before asking anything substantive, confirm the inputs. This ninety-second routine prevents asking a sharp question while Claude is missing or misreading a file.

• List every document you can currently see, with a one-line description of each.

• For each document, give me the three main sections and what they cover.

• Now answer my real question, referencing documents by name and citing where each point comes from.

Worksheet: Synthesis Capture Sheet

Run the four synthesis questions across your loaded sources, then record Claude's answers here so the findings survive outside the chat. This becomes raw material for your brief later.

Convergence — what the sources agree on (and which support each point)

Conflict — where sources disagree or report different numbers

Gaps — important questions none of the sources answer

So what — the three most important takeaways for the decision at hand

Sources loaded (titles)

Exercise: Quote-Back Verification Pass

Take the three or four most important claims from your synthesis and force Claude to prove each one. A claim that cannot be backed by a real, matching quote is suspect and must be verified by hand before it reaches any output.

• For each of the key findings above, quote the exact sentence from the source that supports it.

• For any claim you cannot find a supporting sentence for, say so plainly instead of paraphrasing.

• List every precise statistic, figure, or named citation in your answer so I can verify them against the originals.

Checklist: Grounding and Trust Checklist

[ ] Every claim in the output has a source and page or section attached
[ ] Precise statistics and dollar figures were quote-back tested against the source
[ ] Any named citation or study title was confirmed to actually exist
[ ] Anything past the training cutoff was supplied by me, not recalled from memory

[ ] Claims Claude could not support are marked Not found in the provided sources

Summarization and Document Analysis

Produce layered summaries, extract structured data into clean tables, and mine a transcript for decisions, themes, and follow-ups.

Exercise: Generate a Three-Layer Summary

Take one dense report and produce all three zoom levels in a single chat. Because Claude already holds the full document, this costs one prompt sequence and gives you the right artifact for any reader.

• In one sentence, what is the single most important thing in this report?

• In 150 words, give the key findings, the main risk, and the recommended action, with a page citation for each finding.

• Now give a one-page structured summary with a heading per major section and three to five bullets under each.

Worksheet: Extraction Schema Designer

Before extracting data from a document, design the table. Define the exact columns you want, then hand the schema to Claude. A clear schema plus a source-reference column turns a long read into a quick spot-check.

Source document

Exact column names I want in the table

Rule for missing fields (e.g. write Not specified)

Source-reference column (clause or page number per row)

What I will do with the table once built

Exercise: Mine a Transcript

Paste a real meeting or interview transcript into Claude and run the transcript analysis set. Then have it draft the follow-up so the conversation turns into tracked, actionable output.

• List every decision made in this transcript and who is responsible for it.

• Extract every action item with its owner and any deadline mentioned.

• What three or four themes came up repeatedly? Give a supporting, speaker-labelled quote for each.

• Write a short recap email containing the decisions and action items.

Competitive Analysis and Decision-Ready Outputs

Apply a real framework to competitor data, package the result into a decision brief, and harden your Project into a reusable research home base.

Worksheet: Framework Selection Sheet

Match the framework to the decision you actually face before running anything. The right structure makes the insight obvious; the wrong one buries it in generic output.

Decision I am trying to make

Framework chosen (SWOT / Porter's Five Forces / Feature matrix) and why

Sources I will bound Claude to

Columns or quadrants I want filled

The one gap or move I most want this analysis to reveal

Exercise: Build a Grounded Feature Matrix

Upload pricing pages and a recent article for three to five competitors, then build a comparison matrix bounded strictly to those sources. The goal is to see where the market is crowded and where there is open space you can own.

• Using only the attached sources, build a feature matrix with these companies as rows and columns for Price, Target Customer, Standout Feature, and Stated Weakness.

• Where a source does not address a column, write Not stated, and cite the source for everything else.

• Add a Confidence column rating how directly each cell is supported, then tell me the single most important gap this matrix reveals.

Exercise: Draft a Decision Brief as an Artifact

Turn your synthesis and matrix into a one-page brief a busy decision-maker can act on in two minutes. Render it as an Artifact and refine it in place.

• Using the synthesis and matrix above, draft a one-page decision brief: recommendation first, then context, then four findings each with a source citation, then two risks, then a recommended next step. Render it as an Artifact.

• Tighten the recommendation, cut the brief to 250 words, and add a one-line summary at the very top for forwarding.

• Confirm every cited claim actually appears in the provided sources before I send this.

Checklist: Reusable Project Hardening Checklist

[ ] Custom instructions enforce source citation, no invented facts, and tables for comparisons
[ ] Knowledge base holds only curated, current reference files (no dumping ground)
[ ] Prompt library contains the three-layer summary, extraction recipe, four synthesis questions, framework prompts, and brief structure
[ ] Separate Projects exist for distinct research domains so contexts do not bleed
[ ] A monthly reminder is set to prune stale files and sharpen the custom instructions

Your Action Plan

1. Subscribe to Claude Pro and create a Project named Research Lab.
2. Write standing custom instructions for the Project: always cite sources, never state unsupported facts, flag uncertainty, default to tables.
3. Save your five core prompt templates (summary, extraction, synthesis, framework, brief) into a pinned note in the Project.
4. For your next real task, fill the Model and Surface Decision Sheet and load the relevant documents.
5. Run the inventory-first habit to confirm Claude received every document correctly.
6. Synthesize across the sources using the four synthesis questions and capture the answers.
7. Quote-back test the three or four load-bearing claims and verify any statistics or citations by hand.
8. Produce the deliverable: a layered summary, an extraction table, or a framework matrix as appropriate.
9. Package the findings into a one-page decision brief as an Artifact, leading with the recommendation.
10. After each project, add any prompt that worked well to your library and prune stale files from the knowledge base.