

Simplify Your Life with Claude

Cheat sheet and guide for the Claude Pro plan

Plan details and features are current as of **September 16, 2026**. Anthropic updates Claude often, so check claude.com/pricing for the latest.

1 One-Page Cheat Sheet

The five places you use Claude

Where	What it is	Use it for
Chat	The regular conversation window (web, desktop, phone).	Quick questions, drafting emails, brainstorming, summarizing a document.
Projects	A folder that holds your files, instructions, and related chats.	Anything you do repeatedly: a client, your business plan, your brand voice.
Cowork	Hand Claude a multi-step task and it works through it, even while you step away.	Organizing files, researching on websites, building reports, recurring tasks.
Connectors	Links Claude to your apps (Gmail, Google Calendar, Drive, Canva, QuickBooks, and more).	Letting Claude read your calendar or inbox and act on it, with your approval.
Office and browser add-ins	Claude inside Excel, Word, PowerPoint, and Chrome.	Working on a spreadsheet, deck, or web page without switching windows.

Context + Goal + Format + “Ask me questions first”

- **Context:** who you are and what is going on. “I run a 5-person consulting firm...”
- **Goal:** what you want. “...I need to follow up with a client who went quiet.”
- **Format:** what the output should look like. “Give me a short, warm email under 120 words.”
- **Ask me questions first:** Claude fills gaps instead of guessing.

Five things to try today

- **Inbox.** Paste a tricky email and ask: “Draft a brief, friendly reply that says ____.”
- **Meeting notes.** Paste messy notes and ask: “Turn this into decisions, action items, and owners.”
- **Spreadsheet.** Upload a CSV of expenses and ask: “Categorize these, total by month, and flag anything unusual.”
- **Content.** Paste a transcript or voice memo and ask: “Turn this into three LinkedIn posts in my voice.”

- **Weekly reset.** In Cowork, set a scheduled task: “Every Monday at 7am, summarize my week’s calendar and flag conflicts.”

Pro plan usage in one glance. Resets every 5 hours (weekly limits also apply). Short chats: about 45 messages per 5 hours, often more. Long chats, big files, Research, and Cowork use it up much faster. Track it in Settings > Usage.

2 Free vs. Pro vs. Max

	Free	Pro	Max 5x	Max 20x
Price	\$0	\$20/mo (\$17 annual)	\$100/mo	\$200/mo
Usage	Baseline	At least 5x Free per session	5x Pro per session	20x Pro per session
Models	Sonnet, Haiku	Adds Opus and more	Same as Pro	Same as Pro
Fable models (newest top tier)	No	Pay-as-you-go credits only	Included, up to 50% of weekly limit	Included, up to 50% of weekly limit
Chat, web search, file creation, memory, connectors	Yes	Yes	Yes	Yes
Projects	No	Unlimited	Unlimited	Unlimited
Research (deep, multi-source)	No	Yes	Yes	Yes
Cowork (incl. scheduled tasks, built-in browser)	No	Yes	Yes	Yes
Claude in Chrome	No	Yes	Yes	Yes
Claude for Microsoft 365 (Excel, Word, PowerPoint)	No	Yes	Yes	Yes
Claude Design, Claude Code	No	Yes	Yes	Yes
Extras	—	Priority access at busy times	Higher output limits, early access, priority access	Same as Max 5x

Bottom line. Pro and Max have the same core features. Max mainly buys more usage, plus included access to the Fable models. Start on Pro. Upgrade only after you see yourself regularly hitting limits.

3 How Much Can You Really Do on Pro?

Anthropic does not publish a fixed message count. Usage is measured by how much work Claude does: the length of the conversation, the size of attached files, the model you pick, and the features you use.

What uses more or less of your allowance

Activity	Usage impact	Why
Short questions, quick email drafts	Low	Small amount of text in and out.
Reusing files stored in a Project	Low to medium	Project files are cached, so only new content counts again.
Long chat threads	Medium to high	Claude rereads the whole conversation with every message.
Large PDFs or spreadsheets	Medium to high	Bigger files mean more to read.
Research and web search	High	Claude reads many sources for one answer.
Cowork tasks, browser tasks, scheduled tasks	High	Multi-step work; Anthropic notes these use “significantly more” than chat.
Most capable models (e.g., Opus)	Higher	Models have different usage costs; lighter models stretch further.

Pro is probably enough if you...

- Use Claude several times a day for writing, planning, and questions
- Run an occasional Cowork task or Research report
- Rarely see a “usage limit reached” message

Consider Max (or credits) if you...

- Hit your limit several times a week
- Run Cowork or scheduled tasks every day
- Want the Fable models included
- Rely on Claude for most of your working hours

Middle option before upgrading: usage credits. Turn on usage credits in Settings > Usage. When you hit your limit, you keep working and pay standard API rates for the extra. Set a monthly spending cap so there are no surprises. Your 5-hour reset still happens as usual.

Stretch your Pro usage

- Batch your asks. Put three related questions in one message instead of three messages.
- Start a fresh chat when you switch topics. Long threads cost more with every reply.
- Use Projects for documents you reference often. Files stored there are cached.
- Do not re-upload the same file in the same conversation.
- Be specific up front. Clear instructions mean fewer back-and-forth corrections.
- Pick a lighter model (like Sonnet) for everyday tasks; save Opus for heavy thinking.
- Check Settings > Usage to see your session and weekly progress.

4 What Claude Can Do Right Now

Capability	What it does	Example
Writing and editing	Drafts, rewrites, shortens, and adjusts tone.	Turn bullet points into a client-ready email.
Reading your files	Understands PDFs, Word docs, spreadsheets, images, and screenshots.	Summarize a 40-page contract in plain English.
Creating files	Builds Word docs, Excel sheets, PowerPoint decks, and PDFs you can download.	“Make a 5-slide deck from these notes.”
Web search	Looks up current information and cites sources.	Find upcoming industry conferences this fall.
Research	Deeper, multi-source reports on a topic.	Competitive overview of three vendors.
Projects	Keeps files, instructions, and chats together.	A “Marketing” project with your brand voice guide.
Memory	Remembers context across chats and Cowork. You can view, edit, and control what it keeps in Settings.	It remembers your business and preferred tone.
Artifacts	Builds small interactive tools and web pages inside the chat.	A pricing calculator or event sign-up page.
Connectors	Links to apps such as Gmail, Google Calendar, Drive, Slack, Canva, HubSpot, QuickBooks, and Microsoft 365.	“What’s on my calendar Thursday? Draft prep notes.”
Skills	Saved, repeatable instructions for tasks you do often.	A skill that writes proposals in your format every time.
Cowork	Delegate multi-step tasks; runs in the cloud and continues when you step away.	Sort a messy folder and build a summary spreadsheet.
Scheduled tasks	Cowork tasks that repeat hourly, daily, or weekly, even if your computer is asleep.	Monday morning briefing of your week.
Built-in browser (Cowork)	Claude opens its own browser to navigate sites and fill forms. It does not see your tabs, bookmarks, or passwords.	Compare pricing pages from three software tools.
Claude in Chrome	Works alongside you on the web pages you already have open.	Summarize a long article or fill in a web form.
Claude for Microsoft 365	Claude inside Excel, Word, and PowerPoint.	Build formulas or clean up a deck in place.
Claude Design	Creates visual designs such as mockups, one-pagers, and graphics.	Draft a flyer for your next event.

Capability	What it does	Example
Claude Code	Writes and runs software code. Mostly for technical users.	Build a simple website or automation.

Also available: **Claude for Small Business**, a set of connectors and ready-made workflows (invoice chasing, lead triage, month-end close, marketing planning, contract review, and more) that run through Cowork and ask your approval before acting.

5 20 Ways to Simplify Your Business

Copy these prompts and fill in the blanks. “Where” tells you which part of Claude to use.

Email and communication

Task	Try this prompt	Where
Reply to a tricky email	<i>“Here’s an email I received: [paste]. Draft a warm, brief reply that says yes but moves the meeting to next week.”</i>	Chat
Triage your inbox	<i>“Look at my unread email from the last 2 days. List what needs a reply today, what can wait, and draft replies for the top 3.”</i>	Cowork + Gmail
Hard conversation prep	<i>“I need to tell a vendor we’re ending our contract. Help me plan what to say and anticipate their questions.”</i>	Chat

Meetings and calendar

Task	Try this prompt	Where
Meeting prep	<i>“I’m meeting [name] from [company] on Thursday. Research the company and give me a one-page brief and 5 smart questions.”</i>	Chat + web search
Notes to action items	<i>“Here are my messy notes: [paste]. Turn them into a summary, decisions, and action items with owners and due dates.”</i>	Chat
Find meeting times	<i>“Find three open 30-minute slots next week and draft an email offering them to [name].”</i>	Cowork + Calendar

Marketing and content

Task	Try this prompt	Where
Posts from a voice memo	<i>“Here’s a transcript of me talking through an idea: [paste]. Turn it into 3 LinkedIn posts. Keep my voice; no hashtags.”</i>	Chat
Repurpose one piece	<i>“Turn this webinar transcript into a blog post, a newsletter email, and 5 short social posts.”</i>	Project

Task	Try this prompt	Where
Event flyer	<i>“Create a one-page flyer for our October networking event. Details: [date, place, RSVP link].”</i>	Design or Canva

Sales and clients

Task	Try this prompt	Where
Proposal first draft	<i>“Using these call notes [paste] and my past proposal [upload], draft a proposal for [client]. Ask me for anything missing.”</i>	Project
Follow-up sequence	<i>“Write 3 short follow-up emails, one week apart, for a prospect who went quiet after our demo.”</i>	Chat
Client FAQ	<i>“Based on these client emails [paste], write an FAQ page answering the 10 most common questions.”</i>	Chat

Operations and admin

Task	Try this prompt	Where
Write an SOP	<i>“I’ll describe how I onboard a new client. Turn it into a step-by-step checklist someone else could follow.”</i>	Chat
Clean up files	<i>“Go through my Downloads folder. Sort files into folders by type and rename receipts by date and vendor.”</i>	Cowork (desktop)
Weekly briefing on autopilot	<i>“Every Monday at 7am, summarize my calendar for the week, flag conflicts, and list anything I need to prepare.”</i>	Cowork scheduled task
Compare vendors	<i>“Compare pricing and features for [tool A, B, C] from their websites. Put it in a table with a recommendation.”</i>	Cowork browser

Money and numbers

Task	Try this prompt	Where
Expense review	<i>“Here’s a CSV of expenses. Categorize them, total by month, flag anything unusual, and make a chart.”</i>	Chat
Contract summary	<i>“Summarize this contract in plain English. List renewal dates, cancellation terms, and anything unusual.” (Not a substitute for a lawyer.)</i>	Chat
Budget or pricing model	<i>“Build an Excel budget for a 3-month project with these costs [list]. Include formulas so I can change numbers.”</i>	Chat or Excel add-in

Your personal life

Task	Try this prompt	Where
Meals and groceries	<i>"Plan 5 easy weeknight dinners for a family of 4, under 30 minutes each, with one combined grocery list."</i>	Chat

6 Use It Wisely

- **Check the facts.** Claude can be wrong. Verify numbers, names, dates, and anything you will send or sign.
- **Protect sensitive information.** Do not paste confidential, client, or regulated data unless your company has approved it.
- **You stay in charge.** Cowork asks for approval before acting, depending on the permission mode you choose. Start with the mode that asks every time.
- **Start with trusted websites.** Browser tasks have safeguards against malicious pages, but Anthropic says these reduce the risk rather than eliminate it.
- **Review your memory.** See and edit what Claude remembers in Settings.

7 Get Started in 15 Minutes

1. Sign up or upgrade at claude.ai and download the desktop and mobile apps.
2. Create one Project for your business. Upload a short "about my business" doc and a writing sample.
3. Connect one app you live in (Gmail, Google Calendar, or Outlook) under Settings > Connectors.
4. Try two prompts from Section 5 on real work.
5. Open Cowork and set up one scheduled task (a Monday briefing is a great first one).
6. Check Settings > Usage at the end of the week to see how much you used.

WHENEVER YOU'RE READY

Want help deciding where this fits in your business?

Bring the part of your week that keeps eating your time. In 30 minutes we will name what to hand to an assistant, what to hand to a person, and what only you should still be touching. You will leave with the first task to set up and a clear next step.

[Book an introductory call](#)

calendly.com/loganmcknight/30-min-intro-call

Sources

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