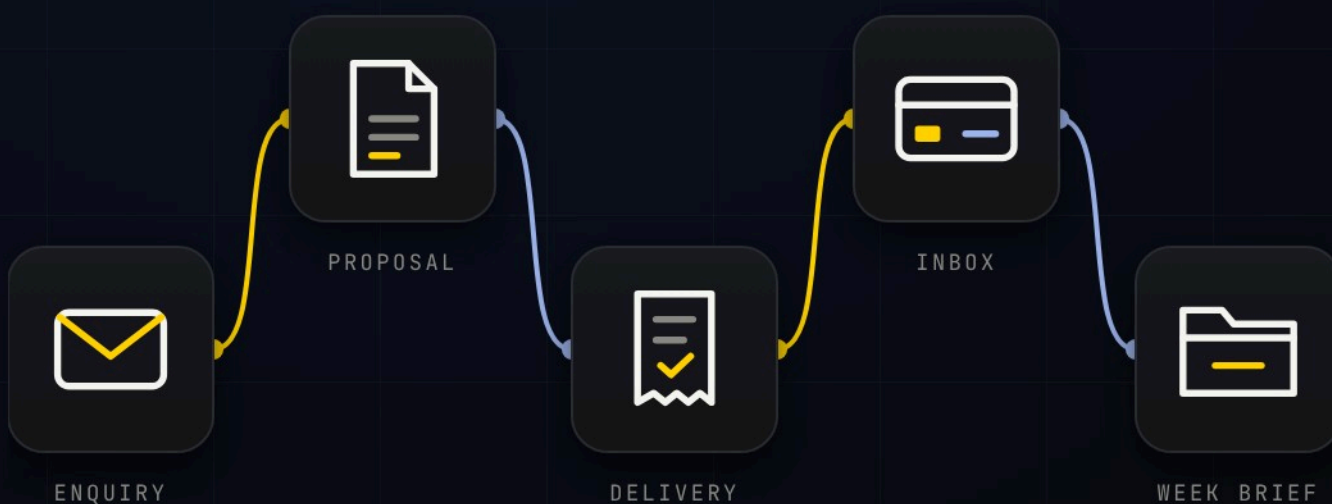


10

AUTUMN 2026
WHAT'S NEW IN CLAUDE

CLAUDE WORKFLOWS FOR BUSINESS OWNERS



Automate your tasks.
Focus on your clients.

www.generativez.es

Less admin. More time to lead.

Between August and October 2026 Claude changed more than in the whole year before: new models, memory, documents and decks in every conversation, Chrome, skills and a proactive assistant. This playbook turns those features into ten workflows for business owners and their teams: winning clients, delivering the work and running the company, with you in control at every key step.

How to read it

Each workflow fits on one page: what starts it, the steps in order, example tools, the moment you stay in control, the usual mistakes and a simple way to begin. Each page names the Claude feature it uses. Availability depends on your plan.

How to use it

Don't build all ten. Pick the three that cost you the most time (page 16 helps you choose), set up the first one, run it for two weeks, then move to the next.

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What's new in **Claude**

The releases that matter for a small business, from Anthropic's own release notes.
We checked them on 22 October 2026.

1 SEP 2026

Claude Fable 5.1

The most advanced models for coding and knowledge work.

16 SEP 2026

Cowork, Docs, Slides and Design in any conversation

No mode to choose: ask for a task, a document or a deck in the same chat.

22 SEP 2026

Claude Opus 5.5

Fable-level results on most work, 40% cheaper to run than Opus 5.

28 SEP 2026

Claude Sonnet 5.5

Faster and cheaper for everyday writing and analysis.

7 OCT 2026

Claude Haiku 5.5 and monthly API credits

A small model for high-volume tasks, and API credits included on Max and Team.

21 OCT 2026

Claude Duet (research preview)

A new app where Claude works as a proactive agent that checks with you first.

3

Models, three jobs

Haiku 5.5 for volume (sorting, labelling), Sonnet 5.5 for everyday writing, Opus 5.5 for judgement and analysis.

Plan

Check your plan

Some features are for Pro and Max, some for Team and Enterprise, some are previews. Each workflow page says which.

Sources: support.claude.com release notes • anthropic.com/news • platform.claude.com release notes.

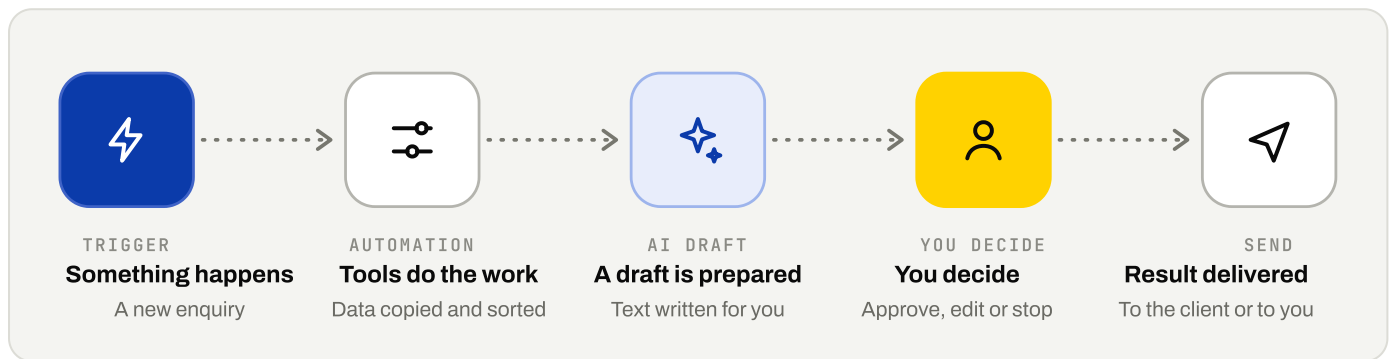
Ten workflows with Claude

From the first enquiry to the Monday brief. Start with the free features at the top, add automations when you are ready.



Anatomy of a workflow

Every page in this playbook uses the same picture. Once you can read one, you can read them all.



- | | |
|---|---|
|  Trigger
The event that starts everything: a form, a status change, a date. |  Automation
Moves or reshapes data between your tools, the same way every time. |
|  AI draft
Writes or reads text: a draft reply, a summary, a receipt. Always checked. |  You decide
The point where you decide. Nothing important leaves without it. |
|  Save
Saves the result where you will find it: CRM, sheet, folder. |  Send
Delivers something to a client, a partner or you. |
|  Wait
Pauses until a date or a condition, such as a reminder. | |

THREE LEVELS OF HELP

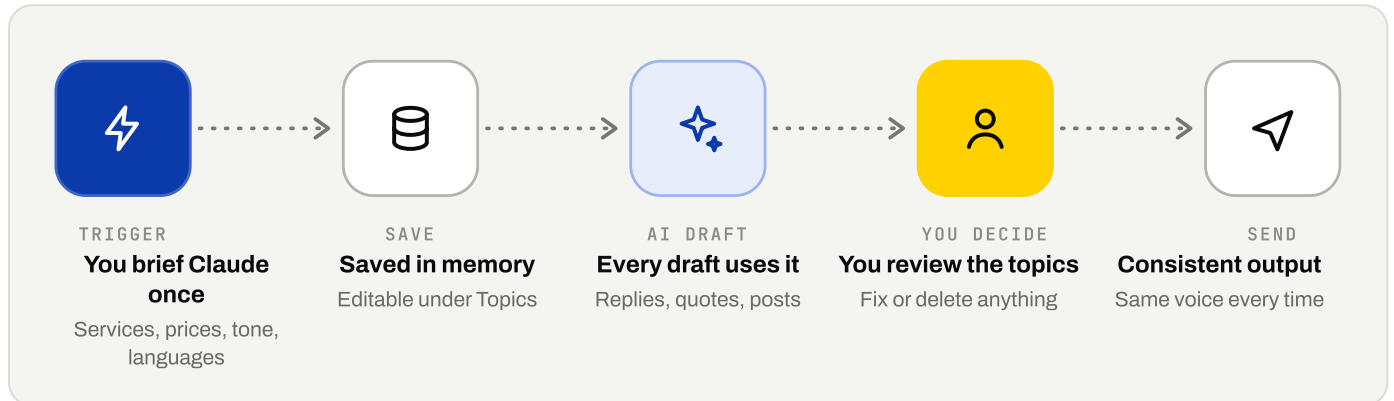
- | | | |
|--|---|---|
| 1
A better prompt
You copy, paste and check. Best for writing and summarising. | 2
An automation
Rules move data between tools. Best for repetitive steps. | 3
An agent with approval
AI handles a pattern, you approve. Best for judgement calls. |
|--|---|---|


The golden rule
 Automate the copying, sorting and reminding. Keep a human check on anything a client will read, sign or pay.

01

Claude that knows your business

Claude keeps your services, prices, tone and languages in memory, so every draft starts from your business, not from zero.



TRIGGER

Once: you tell Claude about your offer. Then every new conversation.

TOOLS (EXAMPLES)

Claude (Free, Pro or Max)

Memory settings

Your price list

WATCH OUT FOR

- ⚠ Old prices in memory: update the topic the day your prices change.
- ⚠ Client personal data: keep names and tax IDs out of memory, use them only inside a task.
- ⚠ Team accounts: memory is off by default on Team and Enterprise, an admin must turn it on.



You stay in control

You can read, edit and delete every memory under Topics. Sensitive topics stay out unless you switch them on.

START SIMPLE

Write one message: who you serve, your five main services with prices, and the tone you want. Then check what Claude saved.

WHERE IT SITS IN THE JOURNEY

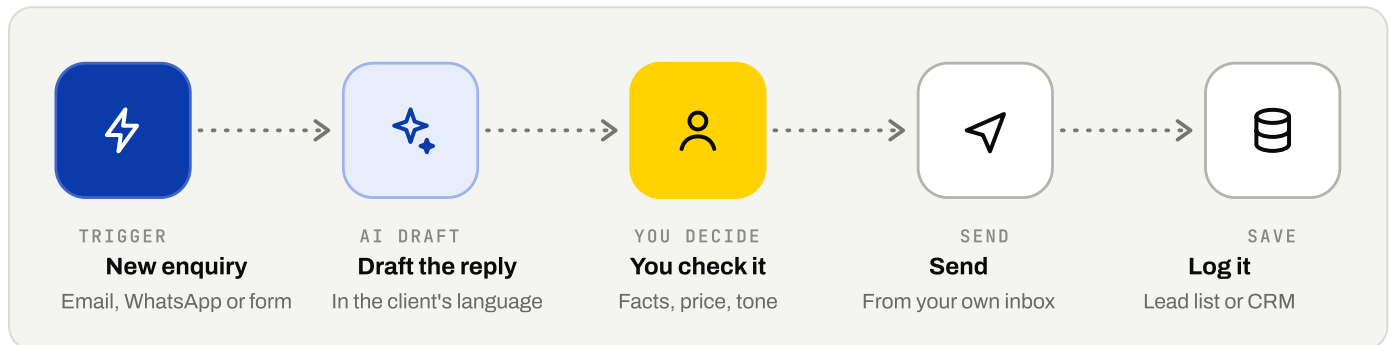
Feeds into 02 · First replies in your client's language



02

First replies in your client's language

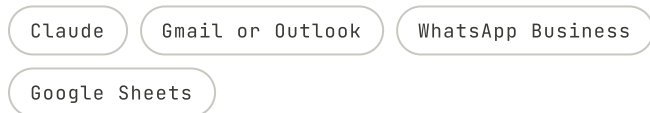
Every enquiry gets a clear, friendly answer in English, Spanish or French, drafted in seconds and checked by you.



TRIGGER

An enquiry arrives by email, WhatsApp or your website form.

TOOLS (EXAMPLES)



WATCH OUT FOR

- ⚠️ Invented prices or dates: tell Claude to use only your price list and say "I will confirm" otherwise.
- ⚠️ Machine-sounding Spanish: ask for the register you use with clients (tú or usted).
- ⚠️ Copying private data into prompts: paste only what the reply needs.

You stay in control
Claude drafts, you send. No price, date or promise leaves without your check.

START SIMPLE

Save one prompt: "Reply to this enquiry in the client's language, using my services and prices from memory. Ask one question to move forward."

WHERE IT SITS IN THE JOURNEY

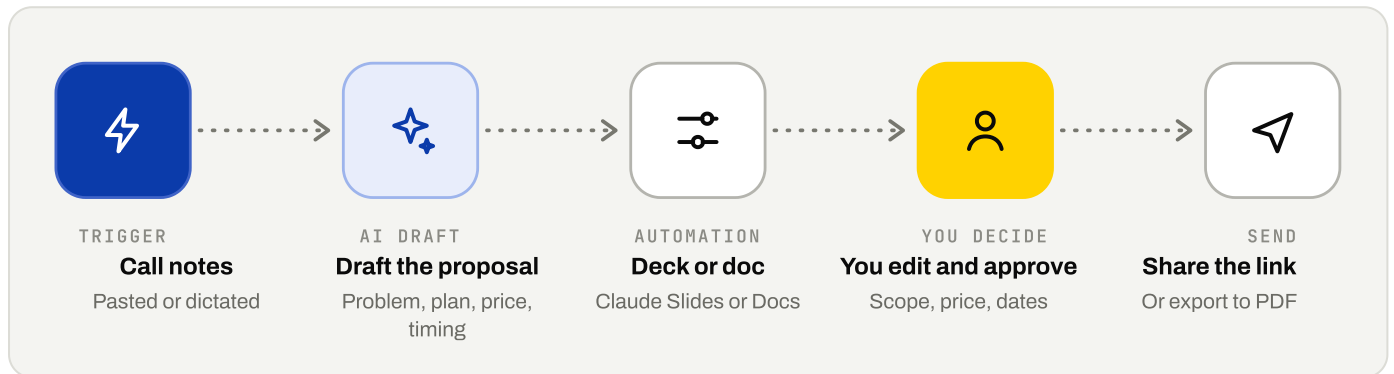
Feeds into 03 • A proposal deck from your call notes



03

A proposal deck from your call notes

Turn rough call notes into a clean proposal: a short document or a five-slide deck, edited in the same conversation.



TRIGGER

You finish a discovery call and paste your notes.

TOOLS (EXAMPLES)

Claude Slides

Claude Docs

Your price list in memory

WATCH OUT FOR

- ⚠ A deck that promises results: keep outcomes you can deliver, no invented figures.
- ⚠ Generic design: give Claude your colours and logo once and ask it to reuse them.
- ⚠ Too long: five slides beat fifteen. Ask for one idea per slide.



You stay in control

You approve scope, price and dates. Claude never sends the proposal itself.

START SIMPLE

Start with your next real proposal. Ask for five slides: their problem, your plan, timeline, price, next step.

WHERE IT SITS IN THE JOURNEY

Feeds into 04 • Hand over a whole task, not just a question

WIN CLIENTS

DELIVER THE WORK

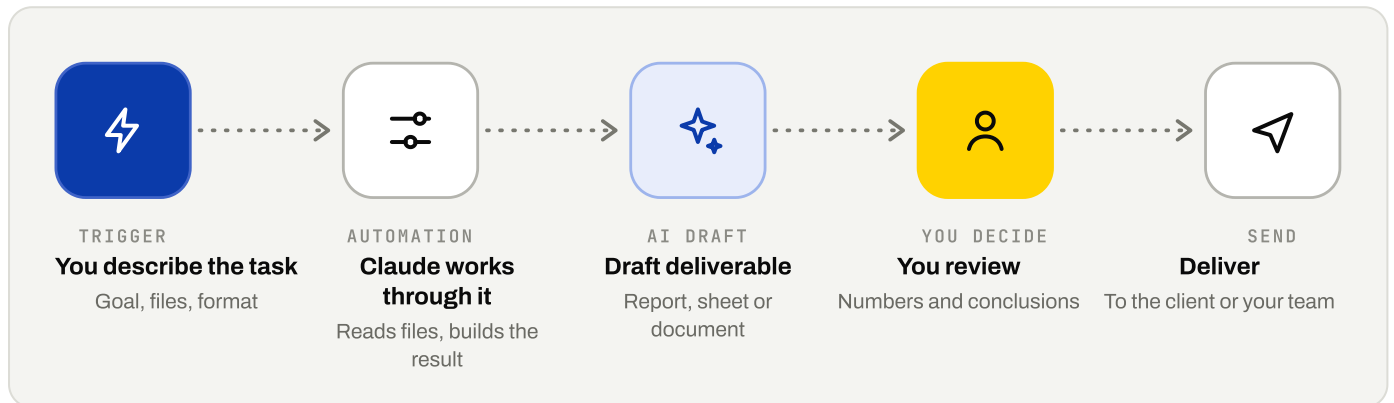
RUN THE BUSINESS



04

Hand over a whole task, not just a question

Give Claude a complete task, such as preparing a client report from a folder of files, and get the finished result back.



TRIGGER

You have a task that takes you an hour or more of copying and formatting.

TOOLS (EXAMPLES)

Claude (Pro or Max)

Your files

Google Drive or a local folder

WATCH OUT FOR

- ⚠ A vague brief: say what "done" looks like, with an example if you have one.
- ⚠ Giving access to everything: share only the folder the task needs.
- ⚠ Trusting totals blindly: check two or three figures against the source.



You stay in control

Claude asks before it changes or deletes files. You review numbers and conclusions before anything reaches a client.

START SIMPLE

Pick one monthly report you build by hand. Describe it once, save the brief, reuse it next month.

WHERE IT SITS IN THE JOURNEY

Feeds into 05 • Repetitive web chores, with your approval

WIN CLIENTS

DELIVER THE WORK

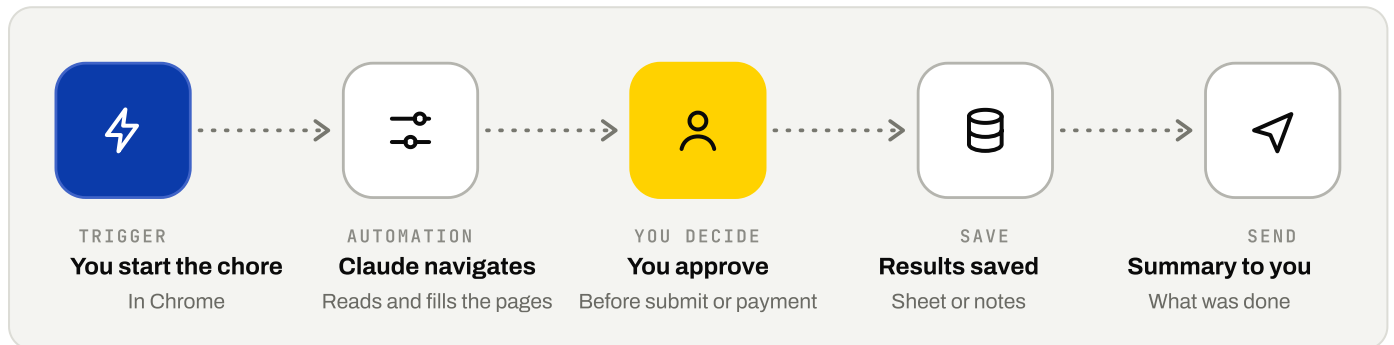
RUN THE BUSINESS



05

Repetitive web chores, with your approval

Claude fills the same web forms and collects information from websites for you, and pauses before anything is submitted.



TRIGGER

A chore you repeat in the browser: supplier portals, directories, price checks.

TOOLS (EXAMPLES)

Claude in Chrome

Google Sheets

Your usual websites

WATCH OUT FOR

- ⚠ Official portals (Agencia Tributaria, Seguridad Social): use Claude to prepare, file yourself or via your accountant.
- ⚠ Passwords: sign in yourself, never paste credentials into the chat.
- ⚠ Hidden instructions on web pages: Claude treats page text as data, still check unusual actions.



You stay in control

Keep "ask before acting" on. Never let Claude submit tax forms, payments or contracts on its own.

START SIMPLE

Start with a read-only chore: collecting prices or contact details from ten websites into a sheet.

WHERE IT SITS IN THE JOURNEY

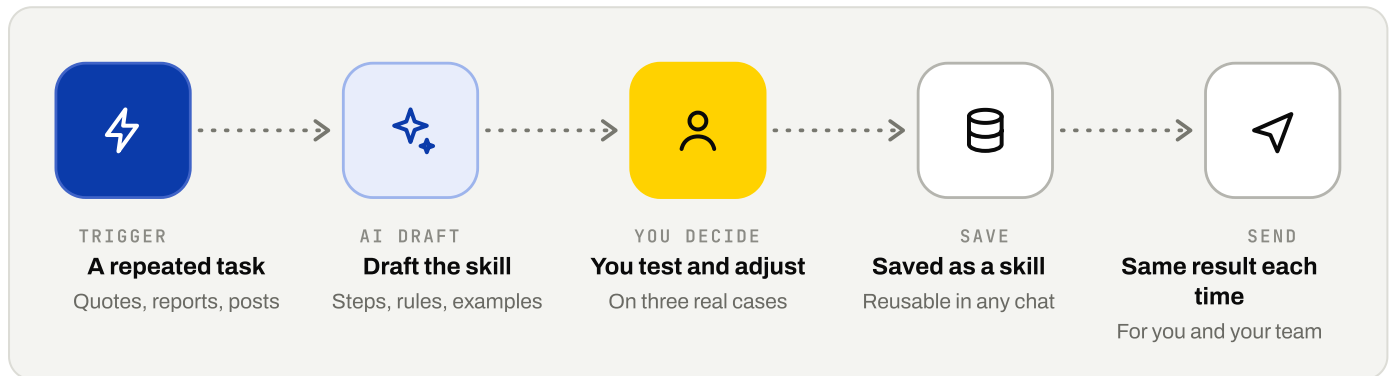
Feeds into 06 · Your house rules, packaged as a skill



06

Your house rules, packaged as a skill

Write your way of quoting, invoicing or reporting once as a skill, so Claude follows the same rules every time.



TRIGGER

A task you explain to Claude again and again.

TOOLS (EXAMPLES)

Claude skills

Your templates

Examples of good past work

WATCH OUT FOR

- ⚠ A skill that does too much: one skill, one job.
- ⚠ No examples: add one good and one bad example, Claude learns fastest from them.
- ⚠ Unknown plugins: install only from the official directory or sources you trust.



You stay in control

A skill only contains what you wrote and tested. Review third-party skills and plugins before you install them.

START SIMPLE

Turn your quote rules into a skill first: services, prices, VAT and IRPF rules, validity date.

WHERE IT SITS IN THE JOURNEY

Feeds into 07 • Your inbox sorted automatically, for pennies

WIN CLIENTS

DELIVER THE WORK

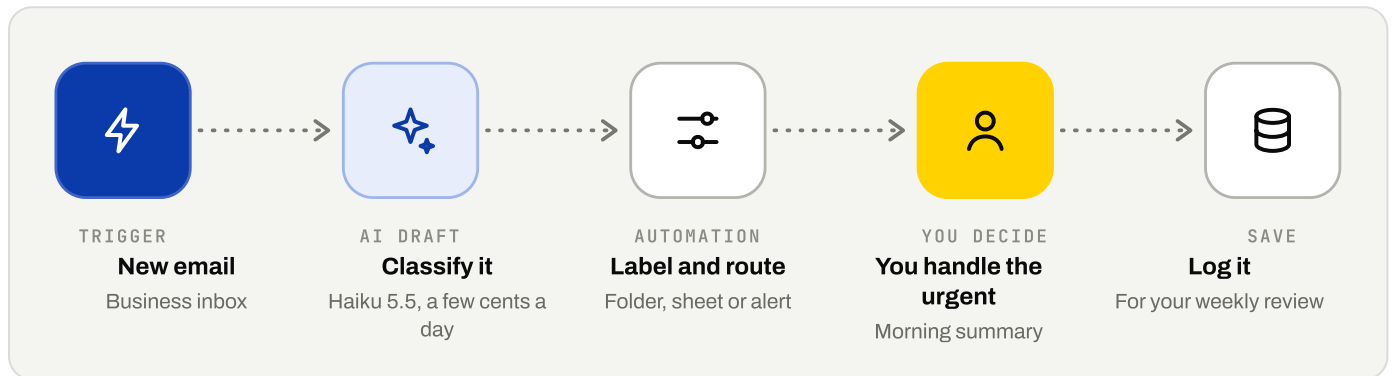
RUN THE BUSINESS



07

Your inbox sorted automatically, for pennies

Every incoming email is classified (lead, client, supplier, invoice, spam) and the urgent ones come to you first.



TRIGGER

A new email arrives in your business inbox.

TOOLS (EXAMPLES)

n8n

Gmail or Outlook

Claude API (Haiku 5.5)

Google Sheets

WATCH OUT FOR

- ⚠️ Acting on what an email says: treat every email as untrusted text, never as instructions.
- ⚠️ Paying for a big model: classification is exactly what a small model is for.
- ⚠️ No fallback: if the API fails, leave the email unlabelled rather than guessing.



You stay in control

The model only labels and summarises. It never replies or deletes on its own.

START SIMPLE

Start with three labels: lead, invoice, other. Add more once those are reliable.

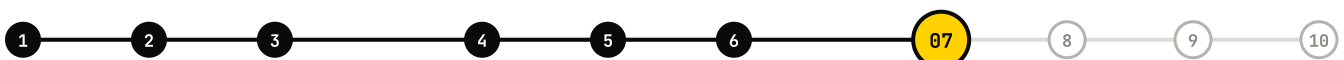
WHERE IT SITS IN THE JOURNEY

Feeds into 08 · Run your own automations on included credits

WIN CLIENTS

DELIVER THE WORK

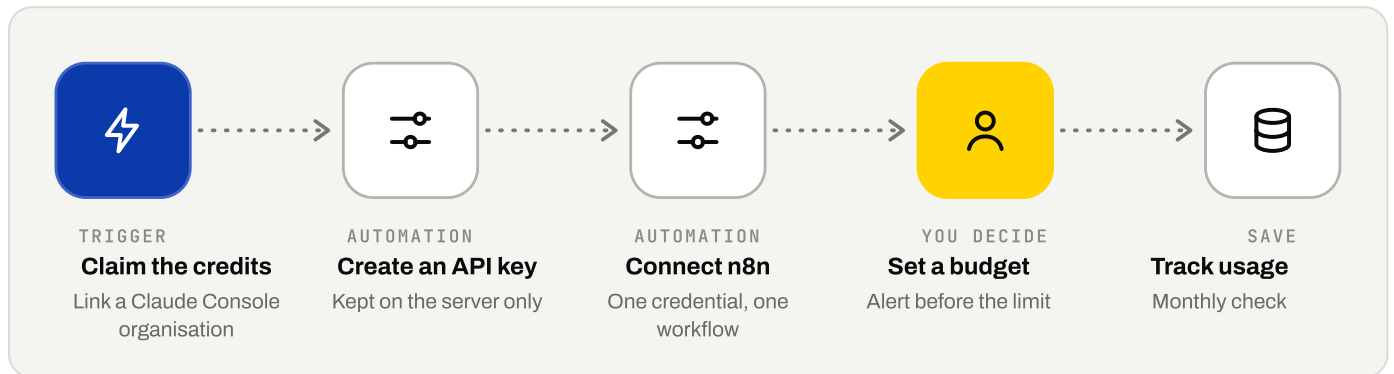
RUN THE BUSINESS



08

Run your own automations on included credits

Use the API credits included in your plan to power the automations in workflows 07 and 09, without a separate bill to start.



TRIGGER

You are on Claude Max or Team and want your first automation.

TOOLS (EXAMPLES)

Claude Console

n8n

Your Max or Team plan

WATCH OUT FOR

- ⚠ An API key in a public file or web page: anyone could use your credits.
- ⚠ No budget alert: set one in the Console the day you create the key.
- ⚠ One key for everything: one key per workflow makes problems easy to trace.



You stay in control

You set the spending limit in the Console. The key lives in n8n, never in your website or a browser.

START SIMPLE

Claim the credits, create one key, and connect it to the inbox workflow (07). That is enough for month one.

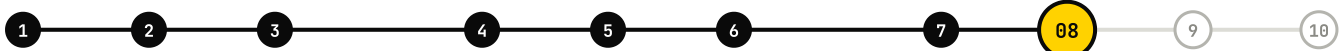
WHERE IT SITS IN THE JOURNEY

Feeds into 09 • A Monday brief of your week

WIN CLIENTS

DELIVER THE WORK

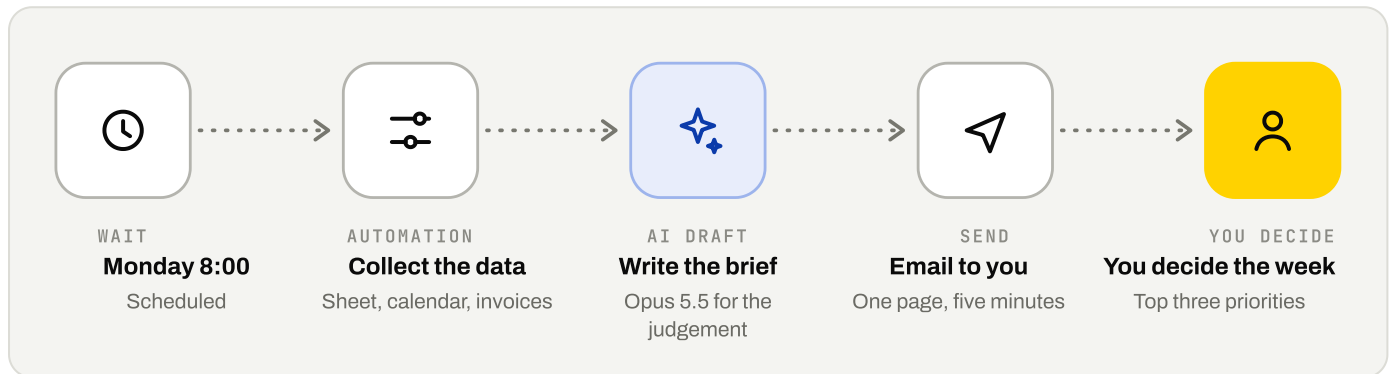
RUN THE BUSINESS



09

A Monday brief of your week

Every Monday, one short email: unpaid invoices, open quotes, meetings, deadlines and the three things that matter most.



TRIGGER

Every Monday at 8:00.

TOOLS (EXAMPLES)

n8n

Google Calendar

Google Sheets

Claude API (Opus 5.5)

WATCH OUT FOR

- ⚠ Too much detail: ask for one page with the three priorities on top.
- ⚠ Stale data: the brief is only as good as the sheet behind it.
- ⚠ Tax dates: a reminder is not advice, confirm deadlines with your accountant.



You stay in control

The brief suggests, you decide. It reads your data but never changes it.

START SIMPLE

Start with two sources: your calendar and your unpaid invoices. Add quotes and leads later.

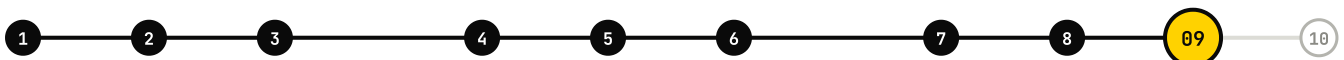
WHERE IT SITS IN THE JOURNEY

Feeds into 10 · A proactive assistant that asks first

WIN CLIENTS

DELIVER THE WORK

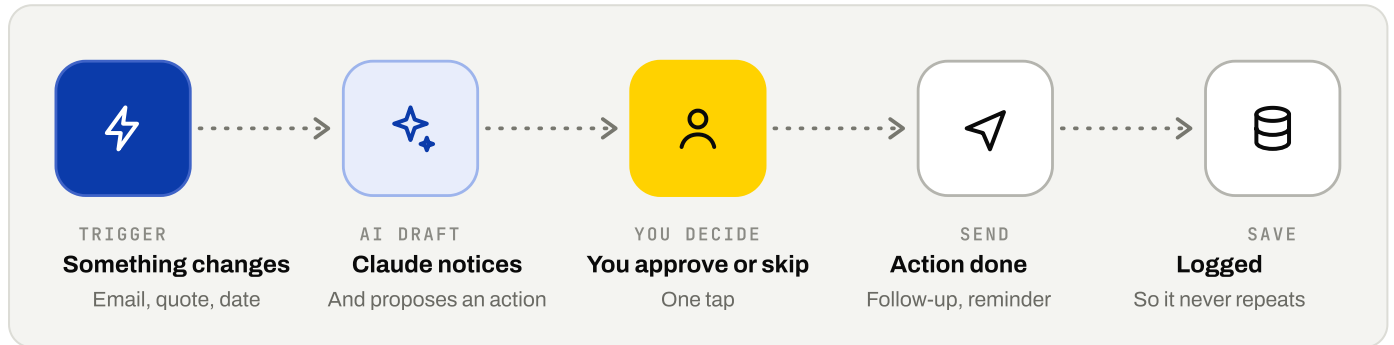
RUN THE BUSINESS



10

A proactive assistant that asks first

An agent that notices what needs doing, such as a follow-up or a reminder, and proposes it to you before acting.



TRIGGER

Something changes: an email unanswered for three days, a quote about to expire.

TOOLS (EXAMPLES)

Claude Duet (research preview)

Gmail

Google Calendar

WATCH OUT FOR

- ⚠ Early access: a research preview can change or be limited. Keep workflows 07 and 09 as your base.
- ⚠ Approving without reading: treat each proposal like an email from a new assistant.
- ⚠ Client-facing actions too soon: let it draft follow-ups for a few weeks before it sends any.



You stay in control

Duet checks with you before it acts on your behalf. Start with low-risk actions such as reminders to yourself.

START SIMPLE

If you can join the preview, try it on your own reminders first. If not, workflow 09 gives you most of the value today.

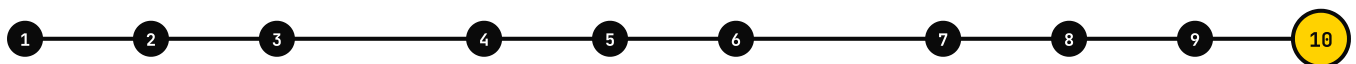
WHERE IT SITS IN THE JOURNEY

Closes the loop: your assistant spots what needs doing next

WIN CLIENTS

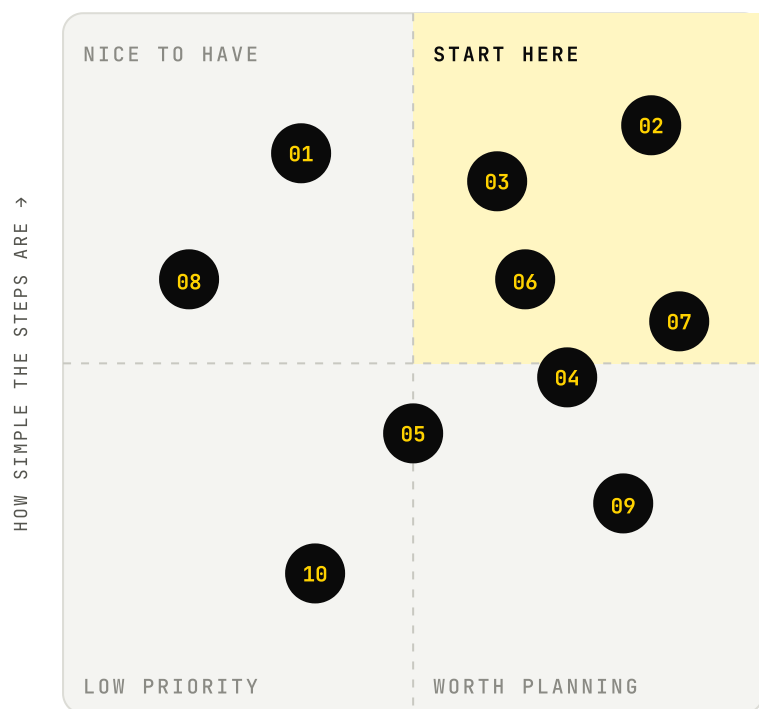
DELIVER THE WORK

RUN THE BUSINESS



Where to start: your first three

The best first workflow is the one that eats your time and has clear, simple steps. Use this grid with your own tasks.



- 01 Claude that knows your business
- 02 First replies in your client's language
- 03 A proposal deck from your call notes
- 04 Hand over a whole task, not just a question
- 05 Repetitive web chores, with your approval
- 06 Your house rules, packaged as a skill
- 07 Your inbox sorted automatically, for pennies
- 08 Run your own automations on included credits
- 09 A Monday brief of your week
- 10 A proactive assistant that asks first

Suggested placement for a typical small business. Your own grid will differ: move the dots to match your week.

YOUR SIX-STEP PLAN

- ☐ Check your plan (Free, Pro, Max or Team) and brief Claude about your business (workflow 01).
- ☐ Place them on the grid: time spent across, simplicity up, and pick three from the top-right corner.
- ☐ Build one workflow, keep the human check, run it for two weeks.
- ☐ List the tasks you did last month and roughly how long each took.
- ☐ Write down how long the first task takes by hand today. That is your baseline.
- ☐ Compare with your baseline, adjust, then start the next one.

■ WHAT'S NEXT

Automate your tasks. Focus on your clients.

■ LEARN IT

AI training

Hands-on sessions in Seville and Málaga, built around your own workflows.

■ BUILD IT WITH US

Automation services

We design, build and run your workflows and AI agents, with human approval at every key step.

■ EVERY MONDAY

The Monday playbook

One practical AI workflow in your inbox each week. Free, unsubscribe in one click.



Generative Z

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Claude, Claude Duet, Opus, Sonnet and Haiku are names of Anthropic. Generative Z is independent of Anthropic. Features and plans change: check claude.com before you rely on them. Tool names are examples and belong to their owners. Check legal, tax and data-protection requirements for your country before automating contracts, invoices or personal data.