

# The Claude Cowork plugin that quietly runs a small business.

An Anthropic Claude plug-in to automate your small or mid-size business. Here are the twenty-five workflows across finance, sales, marketing, and ops — some scheduled, some on demand — that replace your manual routine.

**25**  
WORKFLOWS

**7**  
CATEGORIES

**9**  
INTEGRATIONS

**8**  
ROLES SERVED

**RUN MODE** ● Schedulable ● On-demand ● Both ● One-time setup

## 01 / 07 Daily briefings — one glance across the whole business at the moments that matter most 3 WORKFLOWS

<p><b>monday-brief</b> ● SCHED</p> <p>Start-of-week snapshot: cash, sales, pipeline, top 3 to-dos.</p> <p>CEO / Owner</p> <p>QuickBooks · HubSpot · Calendar</p>	<p><b>friday-brief</b> ● SCHED</p> <p>End-of-week pulse: revenue vs. prior week, top sellers, wins and watches.</p> <p>CEO / Owner</p> <p>QuickBooks · PayPal / Square</p>	<p><b>business-pulse</b> ● BOTH</p> <p>Cross-functional snapshot on demand — cash, sales, pipeline, urgent items.</p> <p>CEO / Owner</p> <p>QuickBooks · PayPal · HubSpot · Calendar</p>
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## 02 / 07 Financial management — cash, close, taxes, and pricing 8 WORKFLOWS

<p><b>cash-flow-snapshot</b> ● BOTH</p> <p>30 / 60 / 90-day forecast with risk flags and confidence bands.</p> <p>CEO CFO</p> <p>QuickBooks · PayPal · Stripe · Square</p>	<p><b>month-end-prep</b> ● SCHED</p> <p>Reconcile QB vs. processors, flag gaps, write P&amp;L narrative, export packet.</p> <p>CFO Bookkeeper</p> <p>QuickBooks · PayPal · Stripe · Square</p>	<p><b>close-month</b> ● SCHED</p> <p>Streamlined close — reconcile, flag gaps, export close packet. Lighter sibling.</p> <p>CFO Bookkeeper</p> <p>QuickBooks · PayPal</p>
<p><b>month-heads-up</b> ● SCHED</p> <p>Runs on the 25th — 30-day cash outlook, flags items needing attention.</p> <p>CEO CFO</p> <p>QuickBooks · PayPal</p>	<p><b>margin-analyzer</b> ● ON-DEMAND</p> <p>Unit economics by product; benchmarks against inflation and cost shifts.</p> <p>CEO CFO</p> <p>QuickBooks · PayPal</p>	<p><b>price-check</b> ● ON-DEMAND</p> <p>Margin-by-product table with three pricing scenario views.</p> <p>CEO CFO</p> <p>QuickBooks · PayPal</p>
<p><b>tax-prep</b> ● SCHED</p> <p>Quarterly estimated tax or year-end 1099 prep; accountant handoff packet.</p> <p>CEO CFO</p> <p>QuickBooks · PayPal · Stripe</p>	<p><b>plan-payroll</b> ● BOTH</p> <p>Forecasts cash, ranks overdue invoices, stages reminders before payroll.</p> <p>CEO CFO HR</p> <p>QuickBooks · PayPal</p>	

## 03 / 07 Sales & CRM — lead triage, follow-ups, and a CRM that stays tidy on its own 5 WORKFLOWS

<p><b>lead-triage</b> ● BOTH</p> <p>Scores HubSpot leads; produces "call these 5 today" with talking points.</p> <p>Sales Lead CEO</p> <p>HubSpot · Calendar</p>	<p><b>call-list</b> ● BOTH</p> <p>Ranks leads, pulls email history, drafts follow-ups, blocks calendar time.</p> <p>Sales Lead</p> <p>HubSpot · Gmail · Calendar</p>	<p><b>crm-maintenance</b> ● SCHED</p> <p>Updates HubSpot from email + calendar context — no manual entry.</p> <p>Sales Lead CEO</p> <p>HubSpot · Gmail · Calendar</p>
<p><b>crm-cleanup</b> ● ON-DEMAND</p> <p>Scans HubSpot for stale deals, duplicates, missing fields. Fixes on approval.</p> <p>Sales Lead Operations</p> <p>HubSpot</p>	<p><b>invoice-chase</b> ● BOTH</p> <p>Drafts overdue invoice reminders matched to each customer's history and tone.</p> <p>CFO CEO</p> <p>QuickBooks · PayPal</p>	<p><b>Continued →</b></p> <p>Marketing, customer service, legal &amp; hiring, and setup on page 2.</p> <p>10 more workflows</p>

**content-strategy** ● SCHED

Analyzes what's selling to produce a prioritized 30-day content brief.

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Marketing CEO

QuickBooks · PayPal

**sales-brief** ● SCHED

Top & bottom sellers, seasonality patterns, 2-week content brief to push winners.

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Marketing Sales Lead

QuickBooks · PayPal

**run-campaign** ● ON-DEMAND

End-to-end: analysis → brief → Canva assets → HubSpot send.

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Marketing

QuickBooks · PayPal · Canva · HubSpot

**canva-creator** ● ON-DEMAND

Builds social designs in Canva from a brief, drafts captions, stages HubSpot sends.

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Marketing

Canva · HubSpot

**customer-pulse** ● BOTH

Aggregates disputes, tickets, and review sentiment into themes with action items.

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Operations CEO

PayPal · HubSpot · Gmail

**handle-complaint** ● ON-DEMAND

Pulls order context, drafts tone-matched response, suggests an operational fix.

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Customer Service Ops

PayPal · HubSpot

**ticket-deflector** ● ON-DEMAND

Reads email, pulls order status, drafts reply; can issue PayPal refunds with approval.

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Customer Service

PayPal · HubSpot · Gmail

**contract-review** ● ON-DEMAND

Flags non-standard terms and risks in plain English; outputs redlined DOCX.

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CEO Operations

Gmail · DocuSign

**job-post-builder** ● ON-DEMAND

Hiring packets: job post, interview guide with rubric, offer letter template.

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HR CEO

DocuSign

**By the numbers**

25 workflows · 7 categories · 9 tools connected · 8 roles served — one plugin.

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Setup below →

**How to install**

In Claude, open **Cowork** → **Customize** → **Browse Plugins** → **Small Business** and add the Cowork plugin. Then run smb-onboard for your first session.

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5–10 minutes to set up

**smb-onboard** ● ONE-TIME

First-session setup — connects tools, runs a demo, interviews about the business.

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CEO / Owner

All connectors

**Type a question. Get a workflow.** ●

"How's cash looking?" → cash-flow-snapshot.  
 "Draft this customer reply" → ticket-deflector.  
 Cowork routes intent to the right workflow behind the scenes.

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One door. Twenty-five workflows behind it.

THE CONNECTED STACK

Plugs into the nine tools small businesses already pay for.

QuickBooks

PayPal

Stripe

Square

HubSpot

Gmail

Google Calendar

Canva

DocuSign