

Your AI Weekly Business Review

Give your assistant a repeatable job: compare this week with last week, check spending, find what is stuck and prepare one improvement. Includes the same dashboard starter so you can try it immediately.

01 Visualize → 02 Automate → 03 Optimize

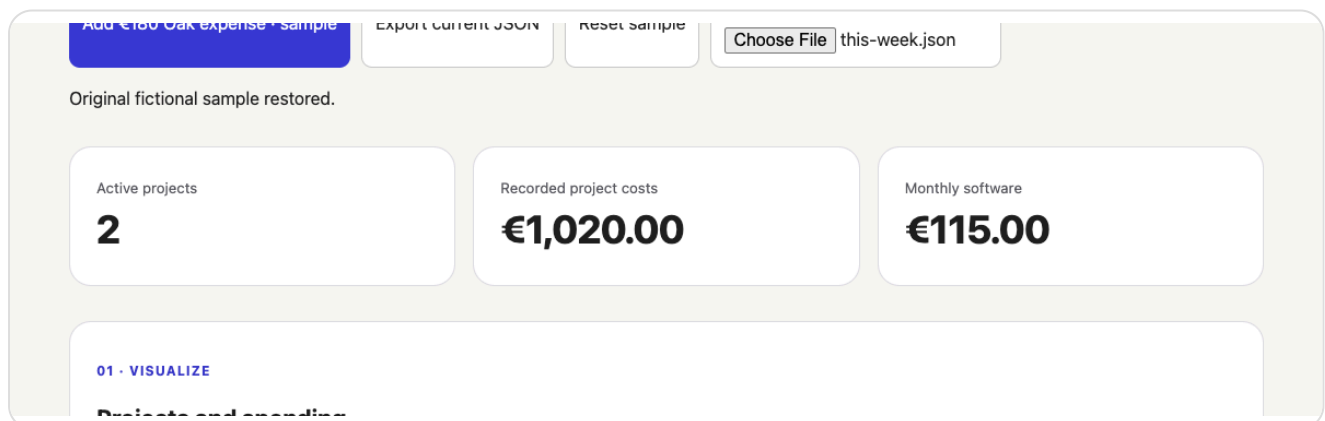
What you will have

A working business dashboard, editable sample records, and the prompts for an assistant that updates files and prepares work.

Start here: [Download the starter folder](#), unzip it, then open **dashboard.html**.

Explore the demo in your browser. To adapt it with AI, use Claude Desktop → Cowork with access to the folder. An account with Cowork access is required; the starter is free.

This is a starter version of a business assistant, not Dani's complete Garry setup.



See what a useful review looks like

STEP 1 · VISUALIZE

Do this

Open dashboard.html from the starter folder. Look at monthly software: €115. Clip tool B is marked unused and costs €39/month. Clip tool A does the same job and is used.

You should see

A concrete decision: review whether to keep Clip tool B. Cancelling it would reduce listed commitments to €76/month, or €468/year less. This is a potential reduction, not money already saved.

Why it matters

The review joins your goal with your spending. It does not give you generic advice to 'be more productive'.

Keep a before and after

STEP 2 · VISUALIZE

Do this

On your first run, export your dashboard JSON as last-week.json. Keep business.json as this week's source. Put both in your Cowork folder. For the exercise, use the supplied last-week.json and this-week.json.

You should see

The sample moves from €720 to €900 spent on Oak. The extra €180 has ID e4. Software commitments stay at €115. No cancellation has happened.

Why it matters

Two dated snapshots let the assistant explain what changed instead of guessing from one screenshot.

Run the review in Claude Cowork

STEP 3 · AUTOMATE

Do this

Open Claude Desktop, choose the starter folder in Cowork and paste 02-weekly-review.md. This prompt asks Claude to compare both snapshots and save its output. It also asks for one useful draft action it can complete locally.

You should see

weekly-review.md shows the €180 increase, Oak €100 over its spending limit, the possible €39/month reduction and one proposed priority. needs-you.md holds only decisions or access that need you.

Why it matters

A useful assistant should prepare work, not hand you a longer to-do list.

Repeat it, then add delivery

STEP 4 · AUTOMATE

Do this

First run the review yourself once. If you want it weekly, ask Cowork to schedule the same task for Friday at 09:00 in your time zone and confirm the task exists in its schedule list. Ensure the task can access your source files at run time. The starter does not install a schedule for you.

You should see

A saved recurring task with the right inputs and output location. Run it manually once from the schedule list. Telegram is an optional next connection, not included in this download.

Why it matters

A schedule starts the work. File access supplies the facts. Telegram only delivers the result; it is not the brain.

Make an improvement and measure it

STEP 5 · OPTIMIZE

Do this

Decide which clipping tool you want. If you actually cancel one, update the records with the effective date and keep a note of confirmation. Ask Claude to record the decision and compare next week's costs. For the practice version, use the clearly labelled sample decision prompt.

You should see

A dated decision, its reason and a measurable follow-up. The review distinguishes a recommendation from a completed action.

Why it matters

Next week the assistant checks whether the decision helped. That is the feedback loop.

Visualize. Automate. Optimize.

01 Visualize → 02 Automate → 03 Optimize

Visualize

Open the dashboard. Understand the work and the numbers.

Automate

Give Claude a folder and a repeatable job. Let it update records and prepare the next action. Add a schedule once the job works.

Optimize

Choose one change. Keep the decision. Check next week whether it helped.

Stuck? If the dashboard looks unchanged, import the updated JSON. If Claude only replies in chat, confirm Cowork has access to the folder and ask it to save the named files. If the review cannot find data, point it to the exact files.

[Claude Cowork setup help](#) · [Scheduling help](#)

Want to build the connected version with your own work? [Join a Switchboards workshop.](#)