

CASE STUDY 04 · AI IMPLEMENTATION · COMPLIANCE GOVERNANCE · OPERATIONS

AI-Powered Compliance Workflow

Design & Implementation.

PHC Consulting's own business infrastructure was built and operationalized using Claude and Claude Cowork — transforming manual, document-heavy compliance and operations processes into AI-governed, auditable workflows. Every deliverable — from legal policy documents and SEO infrastructure to obligation registers and structured compliance calendars — was designed, extracted, and produced through custom Cowork Skills and Claude ecosystem workflows.

Claude Cowork

Custom Skills

PDF Extraction

Structured Output

MCP Connectors

Automated
Workflows

THE KEY ISSUE

THE PROBLEM

PHC Consulting's compliance and operations documentation was managed manually across disconnected tools — Word, email, and static spreadsheets. Legal policy pages, service rate cards, compliance obligation registers, and client-facing deliverables required significant manual effort to produce, version, and maintain. No reusable workflow infrastructure existed, creating a bottleneck that limited delivery speed and scalability as the consulting practice grew.

THE ORGANIZATION NEEDED

- A reusable, governed workflow system for compliance document production
- AI-powered extraction of obligations from unstructured regulatory text
- Standardized structured outputs: registers, calendars, and trackers
- Auditable, clause-referenced obligation registers with deadline logic
- Scalable Skills architecture deployable across multiple client engagements
- Legal and compliance page infrastructure meeting WCAG 2.1 AA standards

OUR SOLUTIONS — COWORK IMPLEMENTATION

WHAT WAS BUILT WITH COWORK

- Custom Cowork Skills for compliance document extraction and structuring
- PDF ingestion workflows converting unstructured regulatory text into obligation registers with clause-level attribution
- Compliance calendar Skills extracting reporting frequency, deadlines, and owner fields from source documents
- Legal infrastructure pages: Privacy Policy, Terms & Conditions, Accessibility Statement, Refund Policy
- PAR-structured case study production workflow with standardized output formatting
- Financial model Skills generating rate cards, projection scenarios, and client pricing calculators

HOW COWORK WAS APPLIED

Claude Cowork's agentic workspace was configured with folder-level access to PHC Consulting's document library. Custom Skills — saved markdown workflow files — were built to encode each repeatable process: obligation extraction, deadline structuring, output formatting, and compliance register population.

Skills executed end-to-end workflows triggered by a single command — ingesting source PDFs, applying clause-level extraction logic, applying tiered deadline and priority logic, and producing structured Word or markdown outputs ready for client delivery or master register integration.

- Persistent memory maintained workflow context across sessions
- Structured JSON outputs enabled register-to-calendar pipeline automation
- Human-in-the-loop checkpoints embedded at each obligation classification step

VALUE ADDED — OUTCOMES DELIVERED

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SEO Infrastructure Completed

Full Wix SEO configuration built via Cowork workflow.

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Legal Compliance Pages Produced

Privacy, Terms, Accessibility, and Refund Policy delivered.

3

PAR Case Studies Structured

Compliance, construction, and healthcare sectors.

100%

Workflow Reproducibility

Every deliverable produced via reusable Cowork Skills.

Manual Document Production



AI-Governed Compliance Workflows

COWORK SKILL HIGHLIGHT

The Obligation Register Extraction Skill ingests unstructured PDF source documents and produces a fully structured compliance register keyed to: LP / party name · Clause reference · Obligation type · Deadline logic · Frequency · Owner field · Priority tier (HIGH / MED / LOW). Output is formatted as a markdown table or Word document, designed for direct integration into a master compliance register — demonstrating the core capability PHC Consulting deploys for regulated-industry clients.