A GUIDE FOR SMALL BUSINESS OWNERS

Claude Starter Kit

Seven setup moves that make Claude learn your business, write the way you talk, and get sharper every month.

SETUP TIME
About 30 minutes

YOU'LL NEED
A Claude account

YOU WALK AWAY WITH
Claude set up around your business

YOUR CLAUDE, SET UP

- [x] Desktop app installed
- [x] Custom instructions written
- [x] Memory on
- [ ] Tools connected
- [ ] Monthly check scheduled

THE ROADMAP

Seven steps, in order

Most people open the app and start typing. These are the steps they skip — and they are the difference between Claude guessing about your business and Claude knowing it.

1. **Install the desktop app**
   Plus the Claude in Chrome extension
2. **Write your custom instructions**
   Who you are, who you serve, how you sound
3. **Turn on memory**
   And tell it exactly what to keep
4. **Run `/setup-claude`**
   A guided setup built around the work you do
5. **Connect your tools**
   Your inbox, your calendar, where your files live
6. **Turn repeats into skills**
   Ask for the same thing three times, then save it
7. **Schedule a monthly check**
   Claude reviews your month on the 1st, without being asked

STEP ONE

01 Install the desktop app

The browser tab is the light version. The desktop app is what lets Claude actually do the work with you — on your computer, inside the tools you already use.

It works with your files

Point it at a folder of quotes, invoices, job photos or spreadsheets and it reads them directly. No copying and pasting into a chat box.

It can use your browser

With the Claude in Chrome extension, it can work inside the sites you are already signed in to, instead of handing you steps to do yourself.

It keeps going while you're away

Hand it a job, shut the laptop, go do the work that actually needs you. Come back to the result instead of a half-finished chat.

> **DO IT NOW**
>
> Install the desktop app and the Claude in Chrome extension in the same sitting, then sign in to both. Doing it in one go is the whole trick — people who leave the extension for later never come back to it.

STEP TWO

02 Write your custom instructions

Settings, then Profile. Paste this in and swap everything in orange for your own details.

COPY AND PASTE — SETTINGS › PROFILE

WHO I AM

I'm [name], and I run [business] in [city]. We [what you do] for [who you serve].

WHO I SERVE

My typical customer is [describe one real customer]. They call us when [the problem, in their words]. What they actually want is [the outcome].

HOW I SOUND

Write the way I talk: plain, direct, friendly. Short sentences mixed with longer ones.
Write to one person, not a crowd. If a customer wouldn't say it out loud, don't write it.

NEVER WRITE

No em dashes. No emojis unless I use them first.
Banned words: leverage, seamless, elevate, unlock, empower, game-changer, delve.
No "It's not X, it's Y" lines. No fake suspense like "here's what nobody tells you."

HOW TO WORK WITH ME

Never make up numbers, prices, reviews or customer stories. If you need a real detail, ask me for it.
When my request is vague, ask me a few specific questions before you write anything.
Tell me when something I wrote is weak, and give me a stronger version.
Skip the warm-up and the summary. Start with the work.

The section everyone skips is the last one. "How to work with me" is what stops Claude from inventing a price, a review or a result, and filling the gaps with fluff. Without it you get writing that sounds confident and isn't true.

STEP THREE

03 Turn on memory

In Settings, switch memory on. Then use it on purpose — you can tell Claude exactly what to hold on to and what to drop.

Remember that a standard drain clearing is $189.

Saved. I'll use $189 whenever your pricing comes up.

Forget that — we moved it to $210 in January.

Updated to $210.

Save on purpose

Your prices, your service area, your busiest season, the five questions customers ask every week, and the jobs you don't take.

Check it monthly

Ask "what do you remember about my business?" and fix anything that has gone out of date. Prices move. Memory doesn't notice on its own.

STEP FOUR

04 Run /setup-claude

A setup guide built into Claude. You type one command and it interviews you about your work, then sets itself up to match. Takes about ten minutes.

01	02	03
Open a new chat	/setup-claude	Press send

WHAT HAPPENS NEXT

- **It asks what you do**
  Pick the role closest to your work. This one answer decides everything it sets up after it.
- **It installs a plugin for that work**
  A plugin is a ready-made toolkit — a bundle of skills and app connections built for one kind of job. You approve it in one click.
- **It runs one skill with you**
  A skill is a saved process Claude follows step by step. You watch one run on real work, so you know what you just installed.
- **It connects your apps**
  It suggests the apps that kind of work usually needs. You sign in to each one, and Claude can work in them from then on.

> **Tip:** answer its questions with real detail about your business — the actual trade, the actual customers, the actual mess. Vague answers get you a vague setup.

STEP FIVE

05 Connect the tools you already use

Once your apps are connected, Claude works from your real information instead of whatever you remembered to paste in. Find them under Settings, then Connectors.

Claude

Gmail or Outlook
Your inbox — quotes out, questions in

Google Calendar
Jobs, appointments, who's where today

Drive or Notion
Where your documents actually live

Your CRM
Customers, leads and job history

QuickBooks or Xero
Invoices, what's paid, what isn't

Something unusual?
Field service and trade software can often be wired in too

START HERE

Connect where your work lives first — usually your inbox and your calendar — then add the rest as you need them. Nothing gets replaced. Claude reads and writes in the same place your team already works.

STEP SIX

06 Turn repeats into skills

A skill is a saved process Claude runs the same way every time. The rule is simple: if you have asked for the same kind of thing three times, make it a skill.

MONDAY	"Write a quote for a water heater swap..."
WEDNESDAY	"Need a quote for a bathroom re-pipe..."
FRIDAY	"Another quote, same format as last time..."

COPY AND PASTE

```
That worked. Turn what we just did into a skill called [skill name]. Include the steps we followed, the rules I gave you, and an example of the final version I approved.
```

Good first skills

Customer quotes. Follow-up emails. Turning a scribbled phone note into a written estimate. The weekly schedule text to your crew.

Keep improving them

Every time you fix something in an output, ask Claude to update the skill so the fix sticks. Otherwise you fix the same thing forever.

SKILL · QUOTE WRITER

Your pricing, your wording, your banned phrases. Runs the same way every time, whoever asks for it.

STEP SEVEN

07 Schedule a monthly check

On the 1st of every month, Claude pulls last month's numbers, tells you what actually worked, and names which skills to update. You don't have to remember to ask.

EVERY MONTH

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

1. Pulls last month's leads, jobs and invoices
2. Ranks where the work actually came from
3. Spots the pattern in what closed, and what didn't
4. Tells you which skills to update, and what to change

HOW TO SET IT UP

COPY AND PASTE

```
Set up a scheduled task that runs on the 1st of every month at 9am, using the prompt below.
```

Then paste the full monthly check prompt from the next page directly underneath it.

Your monthly business check

Swap everything in orange for the tools you actually use.

COPY AND PASTE — RUNS THE 1ST · 9AM

```
It's the first of the month. Run my monthly business check for last month.

1. Pull last month's leads, jobs and invoices from [your CRM / spreadsheet], along with where each lead came from, what it was worth, and whether it closed.

2. Rank my top 5 and bottom 5 lead sources by closed revenue, not by number of leads.

3. For the top 5, tell me what they have in common: the source, the service, the job size, and how fast we replied.

4. For the bottom 5, tell me what most likely went wrong.

5. Give me 3 things to do more of next month, 2 things to stop doing, and 5 customers worth following up with this week.

6. If what actually worked breaks a rule in any of my skills, tell me which skill to update and what to change.

7. Save the report as "Business Check [Month Year]" in [Drive / Notion] and send me a short summary.

Use only my real numbers. If anything is missing, say so instead of guessing.
```

Why step 6 matters: it feeds what your customers actually responded to back into your skills. Without it, your skills stay frozen on the day you wrote them. With it, Claude gets a little sharper every month without you running the review yourself.

No CRM yet? Swap point 1 for your invoices and your call log, and run it anyway. A rough month beats a month you never looked at.

YOUR CHECKLIST

Check these off today

- [ ] Desktop app installed and signed in
- [ ] Custom instructions pasted and filled in
- [ ] Told Claude my prices and my service area
- [ ] Connected my inbox and calendar
- [ ] Built my first skill
- [ ] Claude in Chrome extension added
- [ ] Memory switched on
- [ ] Ran `/setup-claude`
- [ ] Connected where my files live
- [ ] Monthly check scheduled for the 1st

READY FOR THE NEXT STEP?

We teach more of this. Get connected.

This setup is only one of many that build the foundations of your AI journey. Our bite-sized trainings show you more in less time. See what's in the training below. Or let us help you work out what AI can solve for you and your business. Get connected with us and book a call, free of cost.

See what's in the training | Or book a call