Claude 101: the complete guide for business owners.

Set Claude up once, then hand it real work. Everything an owner needs from Claude, boiled down to one idea per page. Read the bold, copy the dashed boxes, skip what you don't need.

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WRITTEN FOR

Owners of service businesses who already use Claude and want a lot more back from it. No tech background needed.

Why Claude feels like a smart stranger.

You open a chat and explain who you are, what you sell, who the client is and how you like things written. Ten minutes later you've got a decent draft. Next week you do it all again.

AI was supposed to give you time back. Instead it's like training a new assistant every Monday. You shouldn't have to.

BEFORE SETUP

Same background pasted into every chat. Answers that could be for any company. You rewrite most of what comes back.

AFTER SETUP

Claude already knows your prices, your clients and your tone. Drafts come back close to sendable. You check instead of rewrite.

WHO WROTE THIS

We're BigWork AI. We set up AI for owner-run service businesses, and we hit every wall in this guide in our own company first. This is what got us past them.

HOW TO USE IT

- **Short on time?** Start with pages 5 and 6. Those two settings fix most of the pain.
- **Dashed boxes** are prompts. Copy them into Claude and swap the [brackets] for your details.
- **Plan tags** in the top corner of each page show what works on the free plan and what needs a paid one.
- **Menus move.** If a button has a slightly different name in your app, look for the closest match.

ALL PLANS

Talk to it like a new hire.

Claude does what you ask, not what you meant. **Brief it the way you'd brief a sharp new hire on day one:** who you are, the job, and the rules.

WHAT MOST PEOPLE TYPE

```
Write an email about the delay.
```

WHAT GETS A USABLE DRAFT

```
I run a 6-person kitchen remodeling company. Write an email to a client whose cabinets are two weeks late because our supplier slipped. Apologize once, give the new install date of [date], offer a free hardware upgrade. Under 120 words, warm, no groveling.
```

DO THIS

1. **Say who you are and who it's for.** "I run a cleaning company. This goes to a property manager we've worked with for two years."
2. **Name the job and what done looks like.** "A reply that confirms the new price and keeps the account."
3. **Add the rules.** Tone, length, format, and anything to avoid. Paste a past example you liked and say "match this."
4. **Attach the real thing.** Use the + button to add the PDF, spreadsheet, photo or email instead of describing it. Strip client names and account numbers first.
5. **Missed? Edit, don't argue.** Click the pencil on your own message, fix the ask and resend. You get a clean second try.

COPY THIS WHEN YOU'RE STUCK

```
Before you start, ask me the three questions you'd need answered to do this really well.
```

Which model? The default handles everyday writing. For long documents or tricky thinking, pick the bigger model from the menu under the chat box. The switch applies from the next reply.

ALL PLANS

When the answer's off, say exactly why.

The first draft is a starting point. **"Make it better" gets you a coin flip.** Telling it what's wrong gets you the fix.

YOU GOT	SAY THIS
Too long	`Cut this to three short paragraphs. Keep the price and the date.`
Too generic	`Name the actual job, price and date. Remove anything that could apply to any company.`
Wrong tone	`Too formal. Write it like I'd text a client I like.`
Wrong shape	`Give me a table: option, cost, timeline, risk.`
Going in circles	`Start a new chat. Paste the best version so far and say what still needs fixing.`

CHECK WHAT MATTERS

Claude can sound sure and still be wrong. Before anything reaches a client, check prices, dates, names and anything legal or medical yourself. For current facts, make sure web search is on.

TEST IT ON LAST WEEK

Pick five jobs you already finished, like quotes or replies. Run them through Claude and compare. Where it's close, use it. Where it's off, that's what your instructions should fix.

COPY THIS

```
Which parts of your answer are you least sure about? Mark anything I should double-check.
```

ALL PLANS

Make it know you.

Instructions follow you into every chat. Use them for the things that are true no matter what you're working on: who you are, how you write, how you like to work.

DO THIS

1. Open **Settings › Your Claude › Instructions**. In older versions of the app it's under Settings › Account.
2. Paste the template below and fill in the brackets. Save.
3. On the same page, read **what Claude remembers** about you. Fix or delete anything wrong. It's on by default on personal plans.
4. For a chat you'd rather it didn't remember, start an **incognito chat** from the new-chat screen.

COPY THIS INTO INSTRUCTIONS

```
About me: I own [business], a [type of] business in [city] with [number] people.
Customers: [who they are and what they care about].
How I write: short sentences, plain words, no buzzwords. Sign off as [name].
How to work with me: give me the answer first, then the detail. Ask one question
when something's missing.
Never: [promises, words or topics to avoid].
```

INSTRUCTIONS

Who you are and how you work. True in every chat.

PROJECTS (NEXT PAGE)

The details of one job: its prices, examples and rules.

On a Team or Enterprise plan? Memory stays off until your account owner turns it on.

ALL PLANS · FREE: UP TO 5

One Project per repeat job.

A Project is a folder with its own instructions and files. **Every chat inside it starts already knowing the job.** Files you drop into a normal chat don't stick; files in a Project do.

DO THIS

1. **Projects › + New Project.** Name it after the job, not the client.
2. Open **Instructions** and paste the box below. Save.
3. Add files with **+**: your price list, two or three past examples you were proud of, and the one-page brief below. **Name files plainly** ("2026 price list", not "doc3"). Claude uses the names to find things.
4. On a Team plan, use **Share** so everyone works from the same files.

COPY THIS INTO THE PROJECT'S INSTRUCTIONS

```
In this project you help me write [quotes / follow-ups / job posts]. Use the price list and match the examples in this project's files. Ask me for anything missing before you guess a number. Keep it under [length].
```

YOUR ONE-PAGE BRIEF: FILL IT IN, SAVE IT AS A FILE, ADD IT TO EACH PROJECT

What we sell, and what it costs:

Who buys from us, and why they pick us:

A typical client (no names), and what they need:

Words we always use. Words we never use:

How fast we reply, and how we sign off:

GOOD FIRST PROJECTS

- Quotes and estimates
- Client follow-ups
- Replies to reviews
- Job posts and hiring

KEEP IT CLEAN

Leave out client names, account numbers and health details. Use "a property manager in Austin," not a name. Update the price list the day prices change.

ALL PLANS

Ask for the finished thing.

Ask what goes in a proposal and you get advice. **Ask for "a one-page proposal for an $18,000 bathroom remodel" and you get the proposal,** ready to edit, share and export.

Documents

Proposals, how-we-do-it guides, onboarding packs. Export to Word or Google Docs.

Slides

Pitch decks and staff training. Export to PowerPoint, Google Slides or PDF.

Designs and tools

One-pagers, flyers, checklists, even a simple quote calculator.

COPY THIS

```
Turn these notes into a one-page proposal for [client]. Sections: what they asked for, what we'll do, timeline, price. Use our price list.
```

COPY THIS

```
Make a six-slide deck that trains new hires on how we answer the phone. One idea per slide, big text.
```

COPY THIS

```
Build a simple quote calculator: square footage in, price range out, using these rates: [rates].
```

THEN

- **Edit it your way:** type straight into it, or keep chatting ("make the timeline a table").
- **It's private until you share it.** On Team plans, links stay inside your company unless an owner allows outside sharing.

ALL PLANS

Teach it a job once.

Projects hold what Claude knows. Skills hold how you do a job. A skill is a saved set of steps Claude picks up whenever that job comes up, in any chat.

DO THIS

1. **Switch skills on.** Under Settings › Capabilities, turn on code execution and file creation. On Team and Enterprise plans your account owner controls this.
2. **Turn on the built-in ones** under **Customize › Skills**: they make real spreadsheets, Word files, slides and PDFs.
3. **Build your own by talking.** Start a new chat and paste the box below. Claude interviews you, you upload your template, then save the skill.
4. **Use it by name:** "Use my weekly-update skill on these notes."

COPY THIS

```
I want to create a skill for [writing our weekly client update]. Interview me one question at a time about how we do it today, then build the skill. Here's a past example with client details removed: [paste or attach].
```

GOOD FIRST SKILLS

- Our quote format
- Weekly client update
- Reply to a bad review
- Job post in our voice

BE CAREFUL

A skill is a set of instructions Claude follows. Only install skills from people you trust, and read them before you switch them on.

CONNECTORS: ALL PLANS

Let it see your actual work.

Connected, Claude can search your inbox, calendar and files for you. **No more copying and pasting your own business into a chat box.**

DO THIS

1. Open **Customize › Connectors**, or click **+** in a chat and choose Connectors.
2. Pick a tool: Gmail, Google Calendar and Drive, or apps like Slack, Notion, HubSpot and Stripe.
3. Click Connect, sign in, and read what it's asking to access.
4. Test it: "Can you see my [tool]? Show me the last three things in it."

COPY THIS

```
Search my email from this month. List every promise I made to a client, with the date and who it was to.
```

COPY THIS

```
Find two 30-minute morning slots next week for a site visit with [client].
```

Claude only sees what your login sees. By default it asks before it sends an email or changes your calendar; check those settings when you connect, and keep them on. Disconnect any time under Customize › Connectors. On Team plans, the account owner adds connectors first.

Research: a report, not a reply. PAID PLANS

Click **+ › Research**. It runs many searches, takes a few minutes and links every claim to its source. Use it for comparing vendors, competitors or a new market; use plain web search for quick facts.

COPY THIS

```
Compare the top four [scheduling apps] for a 10-person [cleaning] company: price, setup time, what owners complain about. Table first, then your pick and why.
```

PAID PLANS

Hand off the whole task.

Chat is for back and forth. **Cowork is for handing over a job** and coming back to the result. In newer versions of the app they're one window: you just ask.

COWORK

Give it a task, not a question. It works through the steps, reads and saves files, and can run on a schedule. Keep the desktop app open for jobs that use files on your computer.

CHROME, OFFICE, PHONE

Chrome: a side panel that reads the page you're on and fills repetitive forms. **Excel, Word, PowerPoint:** Claude inside the file. **Phone:** tap the mic and talk it through between jobs.

COPY THIS INTO COWORK

```
Every Monday at 7am, read my calendar and inbox and give me a one-page brief:
today's meetings, who's waiting on a reply from me, and anything overdue.
```

Stay safe: the house rules.

- **Never paste or upload** passwords, card or bank numbers, or anyone's health details. Clean examples before you share them.
- **Connect only what the job needs,** and only business accounts. In Chrome, close private tabs first: Claude reads what's on screen.
- **Check your privacy setting.** Under Settings › Privacy, decide whether your chats may be used to improve Claude.
- **Let it draft, you send.** Keep approvals on for email and anything that spends money until you trust that job.
- **Check the numbers.** Prices, dates and promises get a human look before they reach a client.

What setup alone won't fix.

Do pages 3 to 10 and Claude will feel like a different tool. Then you'll hit the next wall: keeping all of it right.

- **It needs an owner.** A shared Project only stays right if someone keeps it right, and what each person teaches Claude in their own chats stays in their account.
- **It's built inside one tool.** Paste your brief into ChatGPT too, and now you've got two copies drifting apart.
- **It only knows what reaches it.** Connectors help, but the promise on Tuesday's call and last month's price change don't get written down unless somebody owns that job.
- **It goes stale.** The brief you wrote today is wrong by spring unless someone owns keeping it current.

Every new hire and every new tool starts from zero.

Your business knowledge is spread across your head, a few inboxes and a dozen chat histories. Every time someone new shows up, person or AI, you're the one explaining it again.

What it looks like when it's fixed.

One company brain. Your prices, clients, meetings and the way you work, written down in plain files your business owns. You decide what goes in, and anything private stays out. Claude reads it. ChatGPT reads it. A new hire gets up to speed from it. Meetings and corrections get filed as you go, so next month it knows more than this month. **At BigWork AI we build it, run it and keep it current. We call it your AI department.**

See it on your business in 30 minutes.

Bring one job you're tired of doing. We'll show you what your company brain would do with it.

Book a 30-minute call with Dave →

OR SCAN
TO BOOK
FROM YOUR PHONE

DAVE O'ROURKE · BIGWORK AI · DAVE@BIGWORKAI.COM

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