

# Claude

## An Introduction for Business Owners

How to use it, set it up, and get results from day one

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### **Business Maximiser Coaching**

*Building Strong Profitable Businesses*

# What We'll Cover Today

**01**

## What is Claude?

Not a search engine. Not Google. Here's what it actually is.

**02**

## How to Talk to Claude

The difference between a weak prompt and one that gets results.

**03**

## Chats vs Projects

Why this distinction changes everything.

**04**

## Custom Instructions and Skills

Set it up once, get great results every time.

**05**

## Use Cases and Quick Wins

What business owners are using it for right now.

**06**

## Your Homework This Week

One action to take before next session.

# 01 — What is Claude?

## It is **NOT**...

- ✗ A search engine (like Google)
- ✗ A voice assistant (like Siri)
- ✗ A chatbot that just looks things up
- ✗ Something that reads your files automatically
- ✗ Always right — you still need to check its work

## It **IS**...

- ✓ A brilliant, fast thinking assistant
- ✓ A writer, editor, researcher, analyst
- ✓ Able to hold a full conversation with you
- ✓ Great at handling context you give it
- ✓ Better the more you explain and guide it

Think of Claude like briefing a smart new team member. The more context you give, the better the result.

# 02 — How to Talk to Claude

## WEAK PROMPT

*"Write me a quote."*

vs

## STRONG PROMPT

*"You are a professional cabinet maker. Write a quote for a kitchen renovation job worth \$28,000. The client is a family home in Townsville. Keep it professional and clear."*

## The Four Ingredients of a Great Prompt

### Role

Tell Claude WHO to be. "You are a copywriter..." or "Act as a business coach..."

### Context

Give the background. Industry, client type, situation, tone you need.

### Instruction

Be specific about the task. What output do you want? How long? What format?

### Example

(Optional but powerful) Show Claude a sample. "Write something similar to this..."

# 03 — Chats vs Projects

## Regular Chats

- ▶ Fresh start every single time
- ▶ Claude has no memory of past conversations
- ▶ Great for one-off tasks
- ▶ Quick questions, fast drafts, ad-hoc help
- ▶ No setup required — just open and type

*Best for: quick tasks you do once*

## Projects

- ▶ A persistent workspace — Claude remembers context
- ▶ You set instructions once and they always apply
- ▶ Great for ongoing, repeated work
- ▶ Hiring, marketing, finances, client comms
- ▶ Gets smarter as you refine it over time

*Best for: work you do regularly*

# Setting Up a Project

1

## Create a New Project

In Claude, click 'Projects' in the left menu, then 'New Project'. Give it a clear name (e.g. Marketing, Hiring, Financials).

2

## Write Your Project Instructions

Tell Claude who you are, your business type, your tone, and what you need. This is like writing a job brief for a new employee.

3

## Add Any Key Documents

You can upload files like price lists, SOPs, or brand guides. Claude will reference them in every conversation in this project.

4

## Start Chatting Inside the Project

Every chat inside your project carries your instructions. You don't have to repeat yourself every time.

Example projects: [Hiring](#) | [Marketing and Social](#) | [Client Proposals](#) | [Finance and Cash Flow](#) | [Team Training](#)

# 04 — Custom Instructions and Skills

## Custom Instructions

**Custom instructions are set at the Project level.**

You tell Claude:

- ▶ Who you are and what your business does
- ▶ The tone and style you want (professional, casual)
- ▶ What to always include or avoid
- ▶ Your industry, clients, and context

*Set once. Works in every chat inside that project.*

## Skills

Skills are a step further. They are pre-built sets of expertise — specific knowledge and processes that shape how Claude responds for a particular task or purpose.

- ▶ A skill for writing job ads
- ▶ A skill for post-session client emails
- ▶ A skill for your brand voice and guidelines

*Think: a trained specialist available in seconds.*

# Skills in Action: A Real Example

## Example: Post-Session Client Email Skill

### Without a Skill

1. Open a new chat
2. Explain you're a business coach
3. Explain your email format and structure
4. Paste in your session notes
5. Review and fix Claude's gaps

**X Repeat all of this. Every. Single. Time.**



### With the Skill

1. Open the coaching project
2. Paste your session notes
3. Claude produces the formatted email immediately

The skill already knows:

- Your name and business
- The email format and sections
- Your tone of voice
- What to include every time

**Skills turn Claude from a general assistant into a specialist who already knows your business.**

# 05 — Quick Wins for Business Owners

## Writing

- ▶ Client emails and follow-ups
- ▶ Quotes and proposals
- ▶ Job ads
- ▶ Social media posts
- ▶ SOPs and checklists

## Thinking

- ▶ Brainstorming ideas
- ▶ Planning a launch or campaign
- ▶ Problem-solving with a sounding board
- ▶ Preparing for a difficult conversation

## Reviewing

- ▶ Proofread documents before sending
- ▶ Improve a draft you have written
- ▶ Summarise a long report or contract
- ▶ Check a process for gaps

## Building

- ▶ Scripts for sales calls
- ▶ Onboarding documents for new hires
- ▶ Templates you can reuse
- ▶ Training materials for your team

# Things Worth Knowing



## Always review the output

Claude is very good but not perfect. Read before you send. Think of it as a first draft from a smart assistant, not a finished product.



## Give feedback in the same chat

If the output is not right, tell Claude. "Make it shorter" or "make it more casual" works well. You don't need to start over.



## Claude does not browse the internet by default

Unless web search is turned on, Claude works from its training. It won't look up a current price or news unless you share it.



## It gets better as you use it

The more you refine your prompts and your Project instructions, the more consistent and useful the outputs become.



## Don't share passwords or sensitive data

Claude is secure, but good practice is to never paste private credentials, banking details, or sensitive personal information.

# Your Homework This Week

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*One action. Before next session.*

**1**

**Pick ONE task you currently do manually**

It could be writing a client email, a quote, a social post, anything you write or think through regularly.

**2**

**Try it with Claude this week**

Open [claude.ai](https://claude.ai), give Claude the context it needs (role, situation, what you want), and see what comes back.

**3**

**Bring the result to next session**

What worked? What did not? What would you change? We will review real examples together.

*Not sure where to start? Write a client email you have been putting off.*

# Questions?

**claude.ai**

*Start there. It's free to begin.*

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