

Claude: An Introduction

Your session reference guide and homework handout

01 What is Claude?

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

It is NOT...

- X A search engine (like Google)
- X A voice assistant (like Siri)
- X Something that looks things up automatically
- X Always correct — you still need to review

It IS...

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

02 How to Talk to Claude: Prompting

A great prompt has four ingredients:

Role	Tell Claude who to be. "You are a professional trade business coach..."
Context	Give the background: your industry, client type, situation, and tone.
Instruction	Be specific. What output do you want? How long? What format?
Example	(Optional but powerful) Show Claude a sample: "Write something like this..."

Weak vs Strong: Example

WEAK PROMPT

Write me a quote.

STRONG PROMPT

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

03 Chats vs Projects

Regular Chats

- ▶ Fresh start every time
- ▶ No memory of past conversations
- ▶ Great for one-off tasks
- ▶ Quick questions, fast drafts, ad-hoc help
- ▶ Best for: tasks you do once

Projects

- ▶ Persistent workspace with your instructions
- ▶ Claude always knows your context
- ▶ Great for ongoing, repeated work
- ▶ Hiring, marketing, financials, client comms
- ▶ Best for: work you do regularly

Setting Up a Project: 4 Steps

- ▶ Create a new Project in Claude (left menu) and give it a clear name.
- ▶ Write your Project instructions: who you are, your business, your preferred tone.
- ▶ Add any documents you want Claude to reference (price lists, SOPs, brand guide).

- ▶ Every chat inside that project carries your instructions automatically.

04 Custom Instructions and Skills

Custom instructions are set at the Project level. You tell Claude who you are, your tone, what to avoid, and your context. Set it once and it works in every chat inside that project.

Skills are a step further. They are pre-built sets of expertise that shape how Claude responds for a specific task. Think of a trained specialist available in seconds.

Skills in Action: Post-Session Email Example

Without a Skill	With the Skill
<ol style="list-style-type: none"> 1. Explain you are a business coach 2. Explain your email format each time 3. Paste session notes 4. Fix the gaps in Claude's output 5. Repeat. Every. Single. Time. 	<ol style="list-style-type: none"> 1. Open the coaching project 2. Paste your session notes 3. Claude produces the formatted email immediately

05 Quick Wins for Business Owners

Writing	Thinking	Reviewing	Building
<ul style="list-style-type: none"> ▶ Client emails ▶ Quotes and proposals ▶ Job ads ▶ Social media posts ▶ SOPs and checklists 	<ul style="list-style-type: none"> ▶ Brainstorming ▶ Planning a campaign ▶ Problem-solving ▶ Preparing for a hard conversation 	<ul style="list-style-type: none"> ▶ Proofread before sending ▶ Improve a draft ▶ Summarise a long report ▶ Check a process for gaps 	<ul style="list-style-type: none"> ▶ Sales call scripts ▶ Onboarding documents ▶ Reusable templates ▶ Team training materials

06 Things Worth Knowing

- ▶ Always review Claude's output before sending. It is excellent but not perfect.
- ▶ If the output is not right, give feedback in the same chat. You do not need to start over.
- ▶ Claude does not browse the internet by default. Share current information with it if needed.
- ▶ The more you refine your instructions and prompts, the more consistent the results become.
- ▶ **Do not share passwords, banking details, or sensitive personal data.**

Your Homework This Week

One action. Before next session.

1	<p>Pick ONE task you currently do manually</p> <p>It could be writing a client email, a quote, a social post — anything you write or think through regularly.</p>
2	<p>Try it with Claude this week</p> <p>Open claude.ai, give Claude the context it needs (role, situation, what you want), and see what comes back.</p>

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. Paste it into Claude and see what it produces.

My Notes
