THE SAASY GUIDE TO
CLAUDE

SET IT UP. PUT IT TO WORK.

the complete starter guide, with the Prompt Pack inside



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THE SAASY BUSINESS

Claude Certified Architects in progress.

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START HERE

WHAT IS IN HERE

If you opened Claude, stared at the blank box, and closed it again, same. That is exactly why I built this.

Most people never get past the chat box. They type a question, get a decent answer, and never find out it can hold your whole business in its head, organize your files, run jobs while you sleep, and learn your voice well enough that you stop rewriting everything.

This guide is the setup nobody walks you through, then the prompts that make it worth having set up. Five parts:

	Part	What it covers
ONE	The four decisions	What you want back, which surface, which model, and the one thing that never goes in
TWO	Work with it like a partner	How to talk to it, and the habit that changed everything for me
THREE	Build your Brain	Projects, instructions, knowledge, memory. Where your business actually lives
FOUR	Make it work for you	Artifacts, connectors, skills, and jobs that run without you
FIVE	The Prompt Pack	Copy, paste, fill in the brackets. Everyday, marketing, sales, transcripts, hands-off jobs

> **ABOUT THE ORANGE**
>
> Pink is the through line of this guide. Orange marks anything that is a Claude mechanic rather than a SaaSy one: a setting to flip, a menu to find, a limit worth knowing about. When you see orange, you are being told how the tool works, not how to think.

Work through the parts that match your week. Nobody finishes this in one sitting.

PART ONE

THE FOUR DECISIONS

DECISION 1: WHAT YOU WANT BACK

This is the one most people get wrong, and it is the difference between Claude being useful and Claude being impressive.

> **ANTHROPIC IS MID-CHANGE ON THIS ONE**
>
> Anthropic has started merging the old separate Chat and Cowork buttons into one Claude that you just talk to, and it is rolling out gradually. That means you and someone else could open Claude the same day and see different screens: one of you still has two buttons, one of you does not. Do not worry about which version you are on. The test below works either way.

You want	Do this	What is actually happening
Words back. A draft, a summary, an answer you will edit yourself.	Just ask, plainly, in the conversation.	You steer every step. Claude gives you text, right there, and you keep going back and forth.
Finished files back. Multi-step work you would rather not babysit.	Describe the outcome and hand it off.	Claude makes a plan, does the steps on its own, and hands you the output, even after you have closed your laptop.
To work with the web page in front of you.	Chrome extension	Claude sees the page you are looking at. No copying, no pasting.

THE ONE-QUESTION TEST: *Am I asking for something to read, or asking for a job to get done?*

Read it, just ask. Done, describe the outcome and step back. On a web page, the Chrome extension.

> **IF YOU STILL SEE SEPARATE CHAT AND COWORK BUTTONS**
>
> The same test still tells you which one to click. Words back, click Chat. Finished files back, click Cowork. Once the buttons disappear on your account, you stop clicking anything, you just say what you want in the message box and Claude decides how to handle it.

DECISION 2: WHICH SURFACE

Surface	Use it for
Web (claude.ai)	Your default. Everything works, including handing off bigger jobs. Nothing to install.
Desktop app	Required to be open whenever a job needs to touch files sitting on your own computer. Also where new features land first.
Mobile	Check in on a running job, review output, quick drafts on the move, or hand off a new one.

THE RULE WORTH MEMORIZING: a job you hand off keeps running even if you close your laptop. But if the job needs files sitting on your own computer, the desktop app has to be open for Claude to reach them.

DECISION 3: WHICH MODEL, AND HOW HARD IT WORKS

Think of the models the way you think about tools in a kitchen. You do not get out the stand mixer to stir a coffee.

Model	Think of it as	Reach for it when
Haiku 4.5	The quick answer	One-line questions, fast lookups, simple rewrites. No effort dial, it runs at its own fixed speed.
Sonnet 5	The everyday workhorse	Emails, drafts, recaps, summaries, most of your day
Opus 5	The specialist	Multi-document work, anything a client or the bank will actually see
Fable 5.1	The frontier	Your hardest reasoning problems, rarely

The effort dial is how long Claude works before reporting back, on every model except Haiku. Higher effort reads more, checks itself more, and pushes further. It also takes longer.

Setting	Use it for
Low	Simple rewrites and quick questions when you want speed
Medium	Routine drafting you are going to edit anyway
High	The default. Leave it here for most of your work
Extra	Anything longer or more layered, real stakes, or more than one document at once
Max	The deepest option there is. Save it for the handful of tasks where you want Claude checking itself as hard as it can

THE SIMPLE RULE. Sonnet 5 on High covers most of your week. Move up to Opus 5 when the output is something a client, a bank, or an investor will actually see. Drop to Low when you just want something fast and simple.

> **TIP.** *If a model switches itself mid-chat and tells you on screen, that is not an error and you did nothing wrong. Finish the task there. A fresh chat brings your default back.*

DECISION 4: THE ONE THING THAT NEVER GOES IN

Passwords and login credentials. Anyone's social security number, bank account, or card number. Client or customer information you would not want sitting in a document that could leave your hands. Anything you signed an NDA about.

Not in any tool. Not in any Project. Not to reformat, not to summarize, not with a placeholder swapped in. If you are ever unsure, do not paste it. Bring it to a live session instead. Asking is never the wrong move.

Everything else in this guide is work you can start today.

PART TWO

WORK WITH IT LIKE A PARTNER

Before any of the setup, this. How you talk to Claude matters more than which model you picked.

STOP TYPING. START TALKING.

This is the one that changed the game for me, so I am putting it first.

Our brains think so much faster than we can type. When you type, you stop, you edit yourself mid-sentence, your fingers cannot keep up, and what comes out is a tidy little version of what you actually meant. So Claude gets the tidy little version and gives you a tidy little answer back.

Click the microphone instead. Pretend you are on the phone with somebody. Just riff. Get it all out, sideways and messy and doubling back on yourself, then hit send. Claude is very good at sorting out a ramble. It cannot read a thought you never bothered to finish typing.

> **TIP.** *Say more than feels necessary. The context you would have trimmed out to save your fingers is usually the context that makes the answer good.*

IT IS A THOUGHT PARTNER, NOT A VENDING MACHINE

Most people use Claude like a vending machine. Put a request in, get a thing out, walk away. That works, and it is maybe ten percent of what is sitting there.

The other ninety percent is thinking out loud with something that has read everything and never gets tired of your half-formed idea. Ask it to ask you questions. Hand it the decision you are stuck on. Let it push back.

THREE QUESTIONS TO GO ASK IT RIGHT NOW

How could you help me do my job better?

How could you help me streamline this better?

Based on what you have seen me working on, what should I be handing to you that I am still doing by hand?

That last one is my favorite, and I do it a lot. It will tell you things about your own week that you have stopped noticing.

> **TIP.** *Before you ask for the answer, ask for the questions. "What do you need to know from me to do this well?" turns one good prompt into a real conversation.*

CLAUDE DRAFTS. HUMANS DECIDE.

It is always human. Always, always, always.

Think of it like a paralegal. A good one does an enormous amount of the work, and the lawyer still reads it before anything gets filed. Claude is your assistant, your researcher, your analyst. It brings you the work. You review it and you approve it. That never moves.

Whoever puts their name on the output is the one responsible for the output. That does not change because AI touched it.

> **THERE IS NOW A SWITCH FOR THIS**
>
> Look for Auto or Manual in the message box. Manual is where you start, because it is the default: Claude checks with you before every action. Auto means it keeps working and only stops when something genuinely needs your eyes. Leave sensitive work on Manual. Flip to Auto once you trust the job.

THE HANDOFF DOC

Here is what happens. You have a great long back and forth with Claude, you figure something out together, and forty messages later the chat is slow, bloated, and full of the three wrong turns you took on the way.

Do not keep going in there. Ask for the handoff doc.

> We have worked this out. Write me a handoff document with everything we decided, the reasoning behind it, and anything still open. Written so a fresh chat could pick it up cold with no other context.

Then open a new chat and paste it in. Now you have the foundation without the mess, and you can keep going at full speed. If it is something you will need again, it does not go in a chat at all, it goes in your Project.

FRONT-LOAD THE FIRST PROMPT

Put everything you know into the first message instead of dripping it out over nine. Not because Claude minds, but because every back and forth carries the whole conversation with it, so a long chat of one-line questions burns through your usage far faster than one thorough prompt.

Have the back and forth when you are genuinely thinking. Do not have it because you forgot to mention the deadline.

> **WHY CHATS FEEL SLOWER AS THEY GO**
>
> Every message in a chat gets re-read on every turn. That is why a forty-message thread costs more and moves slower than a fresh one. The handoff doc above is the fix.

PART THREE

BUILD YOUR BRAIN

Your business needs a Brain before it needs more AI. This part is how you give Claude one.

WHAT A PROJECT ACTUALLY IS

A Project is Claude with your business already loaded in the room. Ask something in a plain chat and it knows nothing about you. Ask the same thing inside your Project and it already knows your offers, your prices, your voice, your client, your rules.

A Project holds three things: instructions that tell Claude how to behave, knowledge files that tell it what is true, and every chat you run inside it.

> WORTH KNOWING UP FRONT
>
> Chats inside a Project now carry memory between them, kept inside that Project. Mention something in Monday's chat and Tuesday's chat can pick it up on its own. On a personal account that is already switched on. On a company account it stays off until an owner turns it on. Either way it is a convenience, not a filing system: memory is Claude's best guess, a knowledge file is the exact thing, in your control. If it matters permanently, or has to be exactly right, it still belongs in a knowledge file.

THE GATHER LIST

Five documents. These are the ones that ARE your business, and they load first. A Brain is built from what is true.

	What to gather	Which version
01	Your offers and pricing	Exactly as you sell them today. Names, prices, what is included
02	Your about page or bio	The current one. The story you actually tell
03	Your best email, number one	The one that sounds like you. The one people replied to
04	Your best email, number two	Voice is a pattern, not a fluke. Two proves the pattern
05	One transcript	A sales call, a training, a podcast. You, talking about your work

SKIP: the forty-page brand book from 2019. Anything you would not stand behind today. Perfection. Your Brain needs what is true, not what is pretty.

bring what is true.

> **TIP.** *Do not dump your whole hard drive in. Claude reads everything in the knowledge base, so files that are not relevant water down the ones that are. Five true files beat fifty pretty ones.*

HOW TO CREATE ONE

1. Open claude.ai and click Projects in the left sidebar.
2. Click New Project.
3. Name it and describe it. Claude does not read the name or the description, those are for you.
4. Click Set project instructions and write how you want Claude to behave.
5. Click the plus in the project knowledge panel and upload your files.

WHAT TO WRITE IN THE INSTRUCTIONS

This is the part people skip, and it is the part that does the work. A Project with no instructions is just a folder. Fill this in and paste it:

> You are working inside [business name]. I am [your name], the founder.
>
> What we do: [one or two sentences, plain language].
>
> Who we serve: [your client, in one line].
>
> How I write: [short, warm, no jargon, second person, and so on]. Match the writing samples in the knowledge files.
>
> Never do: invent a price, a date, a statistic, or a client result. If it is not in the files, say so instead of guessing.
>
> Always do: flag anything you were unsure about at the end of your answer.

TIP. *That last line, the one about flagging what it was unsure about, is the highest value sentence in this whole guide. It turns Claude from something that sounds confident into something you can check.*

MEMORY, AND HOW IT IS DIFFERENT

Memory is Claude carrying things forward from your past conversations on its own. Knowledge files are things you deliberately put in the room. Both are useful and they are not the same.

The rule: anything your business runs on goes in a knowledge file, where you control it and can edit it. Memory is a convenience, not a filing system. If it would hurt to lose it, file it.

WHERE TO FIND IT

Memory is a setting you can turn on, off, or clear. Look under Settings, Memory. That is also where you see the list of what Claude has saved, so you can read it, edit it, or delete any of it. If you ever want Claude to stop carrying something forward, that is where you go.

THE TEN PROJECTS

One Project is a good start. A full Brain is ten of them (we also call these tiles), built in this order, because each one stands on the one before it. This is the map we build against. You do not need all ten this month.

	Tile	What lives in it
01	The Core	Identity, voice, offers, the rules. Everything else stands on it
02	Strategy	Vision, goals, decisions. The leadership room
03	Sales	How money gets made, from inquiry to close
04	Marketing	How demand gets created, in your buyer's real words
05	Client Experience	How clients are served, kept, and grown
06	Operations	How work moves through the business
07	Finance	How money is tracked and reported. Never your balance
08	Team	How people are hired, grown, and offboarded. Never personnel files
09	Automation	What already runs without a human
10	AI Employees	The staff roster. The registry, never the starting point

THE BUILD ORDER

1. The Core, always first.
2. Sales and Marketing, the revenue pair.
3. Client Experience and Operations, the delivery pair.
4. Strategy, Finance, Team, Automation, as your business demands.

LAST, ALWAYS LAST: AI EMPLOYEES. Staff comes after the Brain, never before. A hire with nothing to read is a stranger with a keyboard.

BRAIN. STAFF. SCALE. The order is the whole product.

> **TIP.** *If you only build one this quarter, build the Core. Everything else gets easier once Claude knows who you are and how you sound.*

PART FOUR

MAKE IT WORK FOR YOU

Four features that turn Claude from a chat box into something closer to staff. This is where most people have never been.

ARTIFACTS

An artifact is a real thing Claude makes, sitting in its own panel beside the chat instead of buried in the conversation. A document, a spreadsheet, a slide deck, a one-page tool, a checklist you can actually print.

You do not switch artifacts on. You ask for the finished object and one appears. The difference is in how you ask:

If you ask this	You get this
Tell me how to structure my onboarding	A conversational answer you read and forget
Build me an onboarding checklist I can edit and send	An artifact you keep, edit, and reuse

TIP. *The magic words are "build me" and "I can send." Ask for the object, not the advice about the object.*

HEADS UP

Artifacts can be edited in place. You do not have to regenerate the whole thing to change one line, just tell Claude what to change and it updates that piece.

CONNECTORS

A connector is a bridge between Claude and an app you already use. Once it is connected, Claude can search it, read from it, and in many cases write to it, without you copying anything across.

Anthropic builds first-party connectors for the ones most people need, including Google Drive, Gmail, Google Calendar, Slack, GitHub, and Microsoft 365. There is a full directory of others built by outside developers.

WHERE TO GO

1. Open Customize, then Connectors. Or click the plus inside the chat box and choose Connectors.
2. Browse the directory, find the app you want, and click Connect.
3. Follow the login prompts to give Claude access to your account.
4. In a new chat, check the connector is switched on for that conversation.

After that you do not have to name the app every time. Ask for something that lives in there and Claude goes and gets it.

WHAT IT LOOKS LIKE IN PRACTICE

- "Pull the last three proposals I sent from my Drive and tell me what they have in common."
- "What is on my calendar Thursday, and what do I need to prepare for each thing?"
- "Find the email thread with [client] about scope and tell me what we agreed to."

> **THE PERMISSION RULE**
>
> A connector can only reach what your own login can already reach. It does not give Claude access to anything you could not open yourself, and it does not give anyone else access to your things. Connect only the apps you actually need.

> **WHAT CLAUDE DOES NOT DO**
>
> - It does not know what happened after its training unless it searches or you tell it. Ask it to check.
> - It does not see your files unless you upload them or connect the folder. No folder opened, no folder read.
> - It does not reach an app you have not connected. No connector, no access. That is the permission rule working as designed.
> - It does not know your prices, dates, or numbers unless they are in the files. Given a gap, it will fill it. That is what the flag line in your instructions is for.
> - It does not carry memory from one Project into another. What it learns stays in the Project it learned it in.
> - It does not sign anything. It drafts. You decide. Whoever puts their name on the output owns the output.

TIP. *Read that list again as a build list. Search, uploads, connectors, knowledge files, memory that stays where you put it, a review step. Six limits, and Part Three and Part Four already showed you how to set up every one.*

SKILLS

A skill is a job you taught Claude once so you never have to explain it again. Instead of pasting the same four paragraphs of instructions every time you write a newsletter, you save those instructions as a skill, and Claude loads them on its own when the task matches.

This is the step where prompts stop being things you retype and start being things your business owns.

HOW YOU KNOW YOU NEED ONE

You have typed roughly the same instructions three times. That is the whole test. Anything in your Prompt Log at the back of this guide that shows up twice is a skill waiting to happen.

HOW TO MAKE ONE

1. Turn on Code execution and file creation first. Skills need it to run. It lives under Settings, Capabilities.
2. Ask Claude to build it with you. Say “help me turn this into a skill” and paste the instructions you keep reusing. It will interview you and write it.
3. Give it a clear name and a specific description. The description is what tells Claude when to reach for it, so a vague one means it never triggers.
4. Add it under Customize, Skills, then test it by asking for the job in normal language.

TIP. *Watch for the confirmation that the skill loaded at the start of Claude's reply. No confirmation means it did not trigger and you are getting a generic answer. Nine times out of ten the fix is a sharper description.*

MENUS MOVE

Claude ships changes often. Right now the on-switch, Code execution and file creation, lives under Settings, Capabilities, and the skills themselves live under Customize, Skills. If that has shifted again by the time you are reading this, look for the word Skills and you will find it.

ABOUT THOSE MAGIC WORDS

You will see guides selling prompt codes: type a made-up word and Claude switches gears. There is no secret syntax. A word only works if Claude already knows what you mean by it, and a code nobody defined is a word it has never met. What does exist is the slash menu. Type a forward slash in the message box and you get a short list of real commands, published and documented. That is a menu, not a magic word. The honest version is better anyway. Define your own shortcuts once, in plain English, in your Project instructions or a skill, and they work every time after that. That is not a trick. That is your Brain doing its job.

SCHEDULING

This is the one that changes how the week feels. A scheduled task is a job you write once that Claude runs on a cadence you choose, daily, weekly, or monthly, whether or not you are at your desk.

This still lives with the bigger, hands-off jobs, what used to sit behind its own Cowork button. The quickest way in is to type /schedule in the message box, which works wherever you are. You can also look for Scheduled in the left sidebar, or just tell Claude "schedule this to run every Monday" and follow the prompts. Write the job the same way you would write it in a chat, and pick when it runs. Each run happens in its own session, and you read the results when you are ready.

> **TWO THINGS TO KNOW**
>
> Scheduled tasks run remotely, so they still run when your laptop is closed. But because of that, they cannot reach a folder on your computer. They work with your connectors and the files saved to your Claude account.

THINGS WORTH SCHEDULING

Start with one. Pick whichever of these you are currently doing by hand on a Monday.

The job	When	Roughly what you write
Monday brief	Weekly	Read my calendar and inbox for the week ahead. Tell me what needs a decision from me, what needs a reply, and what I should move.
Content recap	Weekly	Take my notes from this week and draft the recap post and the email, in my voice, before Friday.
Follow-up list	Weekly	Find every conversation where someone asked me something and I have not replied. List them with what they asked.
Market watch	Monthly	Search for what changed in [your industry] this month. Summarize in five bullets, with sources and dates.
Numbers note	Monthly	Pull last month's figures from [wherever they live] and write a plain English summary of what moved and why.
Client check-in	Monthly	List every active client, when I last spoke with them, and who has gone quiet.

> **TIP.** *Run the job manually once before you schedule it. Get the output right, then set the cadence. Scheduling a job you have not tested just means being wrong on a timer.*

PART FIVE

THE PROMPT PACK

Everything from here is copy, paste, fill in the brackets, run. Take the pages that match your week and skip the rest.

Every page follows the same shape, so you learn the format once:

OPEN. Which surface, and where your business context lives.

START WITH. Which model, and how hard you want it thinking.

THE WORK ORDER. Copy it. Paste it. Fill in the brackets. Run it.

TIP. Why it works that way, in plain English.

THE WORK ORDER

Every prompt in this pack is four lines, always in this order. Once you can write one of these from scratch, you do not need a prompt pack any more.

Role: Who Claude is acting as.

Context: What it needs to know.

Task: The specific job.

Format: The shape of done.

BEFORE YOU TYPE: Check what you are about to paste. Give it the minimum it needs, not your whole hard drive.

BEFORE IT LEAVES YOUR HANDS: Is it accurate? Is anything invented? Would you actually send this?

SECTION 1

YOUR EVERYDAY

1.1

THE THREAD YOU ARE BEHIND ON

THE SCENARIO. You were added to a thread forty messages deep. Your name comes up twice. You have a call about it in ten minutes.

OPEN. Web, desktop, or mobile. Plain chat, no Project. Paste the thread.

START WITH Sonnet 5 on High effort.

> **Role:** You are my chief of staff.
>
> **Context:** I was added to this thread late and I have a call about it in ten minutes.
>
> **Task:** Catch me up. What is this about, what has been decided, what is still open, and what does this person want from me.
>
> **Format:** Four short paragraphs. Then one line: the single thing I should say on this call. [paste the thread]

> **TIP.** *A quick back-and-forth, not a job you hand off. You want words in ten minutes, not a project.*

NEXT MOVE. *What is everyone here actually asking for, including what they are not saying directly?*

1.2

MAKE THIS SHORTER

THE SCENARIO. You wrote something. It is twice as long as it should be.

OPEN. Web, desktop, or mobile. Plain chat, no Project.

START WITH Sonnet 5 on Low effort.

> **Role:** You are a ruthless editor.
>
> **Context:** I wrote the text below and it is too long.
>
> **Task:** Cut it by half without losing anything that matters. Tell me what you cut and why.
>
> **Format:** The shortened version first. Then a short list of what came out. [paste your text]

> **TIP.** *Ask for the reasoning. You learn your own writing tics within a week.*

1.3

THE EMAIL WITH FOUR THINGS IN IT

THE SCENARIO. One email, four topics, three questions buried in the middle, one deadline mentioned in passing.

OPEN. Web, desktop, or mobile. Plain chat, no Project. Paste the email.

START WITH Sonnet 5 on High effort.

> **Role:** You are my operations assistant.
>
> **Context:** I received the email below. I have four minutes.
>
> **Task:** Pull out every question I am being asked and every action that is mine. Flag anything where the deadline is unclear or contradictory.
>
> **Format:** Two short lists, Questions and My Actions. Then one line: what is unclear. [paste the email]

> **TIP.** *"Flag anything unclear" belongs in almost every prompt you write.*

NEXT MOVE. *Now draft my reply. Under 150 words. Warm but efficient.*

1.4

WHAT AM I MISSING

THE SCENARIO. You have a plan and a nagging feeling something is not covered.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Opus 5 on Extra effort.

> **Role:** You are the most thorough person on my team.
>
> **Context:** Here is a plan I am about to send.
>
> **Task:** Tell me what is missing, what could go wrong, and what question someone will ask that I have not answered.
>
> **Format:** Three short lists. Be direct, not polite. [paste the plan]

> **TIP.** *"Be direct, not polite" changes the output more than any other instruction in this pack.*

1.5

PRIORITIZE MY WEEK

THE SCENARIO. Eleven things on your list and no sense of order.

OPEN. Web, desktop, or mobile. Plain chat, no Project.

START WITH Sonnet 5 on High effort.

> **Role:** You are my executive coach.
>
> **Context:** Here is everything on my plate this week: [list].
>
> **Task:** Tell me which three to do first and why. Tell me what to drop or delegate. Be direct.
>
> **Format:** Ranked list, one line of reasoning each. Then Drop or Delegate.

> **TIP.** *Delegate does not have to mean a person yet. Sometimes it means Claude, and that is fine.*

1.6

THE RAMBLE INTO A BRIEF

THE SCENARIO. You talked it out for six minutes on the microphone. It is all in there, in no order.

OPEN. Web, desktop, or mobile. Plain chat, no Project. Paste the transcript, or dictate it live.

START WITH Sonnet 5 on High effort.

> **Role:** You are my chief of staff.
>
> **Context:** Below is a ramble I recorded while thinking out loud about [what]. It is messy on purpose.
>
> **Task:** Turn it into a clean brief. What I am trying to do, what I have decided, what I am still unsure about, and what I asked for. Do not add anything I did not say.
>
> **Format:** Four short sections with those headings. Then one line: the question I kept circling without answering. [paste the ramble]

> **TIP.** *This is Part Two in action. Say it messy, let Claude make it neat. The order you talked in is never the order it should be read in.*

SECTION 2

MARKETING AND CONTENT

The ones that fill the calendar. These get dramatically better once your voice samples are in your Project.

2.1

A WEEK OF CONTENT FROM ONE IDEA

THE SCENARIO. You have one good thought and a content calendar with nothing in it.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Opus 5 on High effort.

> **Role:** You are my content strategist.
>
> **Context:** Here is the one idea I want to get across this week: [the idea]. My audience is [who]. The thing I want them to eventually do is [offer or next step].
>
> **Task:** Turn this into a week of content. Same idea, different angles, so it does not read as repetition. Match the voice in my project files.
>
> **Format:** Five posts. For each one, the hook, the body, and the one line at the end. Tell me which platform each suits best and why.

> **TIP.** *One idea, five angles beats five ideas. Repetition is how a message lands, not a thing to apologize for.*

NEXT MOVE. *Which of these five is weakest, and what would make it land harder?*

2.2

HOOKS THAT ACTUALLY STOP PEOPLE

THE SCENARIO. The post is fine. The first line is not.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Sonnet 5 on High effort.

> **Role:** You are a direct response copywriter.
>
> **Context:** Here is the post: [paste]. My reader is [who] and right now they are feeling [what].
>
> **Task:** Write me ten first lines for this. Vary the approach: a question, a flat statement, a number, a thing they secretly think, a mistake they are making.
>
> **Format:** Ten hooks, numbered. Then tell me which three you would bet on and why.

> **TIP.** *Ask for ten and use one. The first three will be obvious. The good one is usually somewhere around seven.*

2.3

THE EMAIL TO YOUR LIST

THE SCENARIO. You have not emailed in a while and now it feels like a whole production.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Sonnet 5 on High effort.

> **Role:** You are my email writer.
>
> **Context:** Here is what happened this week that is worth telling my list about: [notes]. My list knows me from [context].
>
> **Task:** Write the email. Lead with the story, not the announcement. One clear next step at the end, not three.
>
> **Format:** Three subject line options. Then the email, under [length]. Match the voice in my project files.

> **TIP.** *One next step per email. Two asks means people pick neither.*

2.4

REPURPOSE WHAT YOU ALREADY MADE

THE SCENARIO. You recorded something good. It is sitting in a folder doing nothing.

OPEN. Web, desktop, or mobile, in your Project. Paste the transcript.

START WITH Opus 5 on High effort.

> **Role:** You are my content repurposer.
>
> **Context:** Here is the transcript of [what it was]. [paste]
>
> **Task:** Pull out every idea in here that could stand on its own. For each one, tell me what format suits it best and why.
>
> **Format:** A list of standalone ideas. Then draft the three strongest as posts in my voice.

> **TIP.** *One long thing you already made is usually a month of short things. This is the most underused hour in a founder's week.*

2.5

SAY IT WITHOUT THE HYPE

THE SCENARIO. You wrote something and it reads like everyone else's marketing.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Sonnet 5 on High effort.

> **Role:** You are my brand editor.
>
> **Context:** Here is what I wrote: [paste]. Here is what I never want to sound like: overhyped, generic, or like I am talking down to anyone.
>
> **Task:** Rewrite it so it says the same thing without the inflation. Cut every claim I cannot back up, and tell me which claims those were.
>
> **Format:** The rewrite. Then a list of what you cut and why.

> **TIP.** *Receipts over adjectives. If a sentence would be just as true for any other business in your space, it is not saying anything.*

SECTION 3

SALES AND CLIENTS

3.1

PREP ME FOR THIS CALL

THE SCENARIO. A call in an hour and you have not looked at the notes.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Opus 5 on High effort.

Role: You are my briefing analyst.

Context: I have a call with [who] about [what]. Here is what I know: [notes, past emails, whatever you have].

Task: Build me a briefing. What they want, what I want, where we are likely to disagree, and what I should ask.

Format: One page. Their goals. My goals. Friction. Five questions I should ask.

TIP. *The friction section is the one that earns its keep. It is the part you would not have thought about on your own.*

3.2

THE FOLLOW-UP YOU KEEP NOT SENDING

THE SCENARIO. The call went well. That was nine days ago.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Sonnet 5 on High effort.

Role: You are my business development associate.

Context: I spoke with [who] on [when] about [what]. My notes: [messy is fine]. It has now been [how long].

Task: Draft the follow-up. Acknowledge the gap without over-apologizing for it. Confirm what we discussed and make the next step obvious.

Format: Under 150 words. One clear next step at the bottom.

TIP. *Do not open with an apology for the delay. Open with something useful and the delay stops being the subject.*

3.3

THE OBJECTION YOU KEEP HEARING

THE SCENARIO. The same sentence keeps ending your calls and you have stopped hearing it properly.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Opus 5 on High effort.

Role: You are a sales strategist.

Context: I keep hearing this: [the objection]. Right now I respond with: [what you say].

Task: Tell me what they are actually saying underneath that objection, why my current answer is not landing, and give me three better approaches.

Format: The diagnosis first. Then three approaches, with a note on when to use each.

> **TIP.** *Most objections are not about the thing being said. Ask what is underneath before you ask for a better script.*

3.4

WHAT WOULD A SKEPTIC SAY

THE SCENARIO. You are about to put an offer in front of people and you are too close to it.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Opus 5 on Extra effort.

Role: You are a skeptical buyer who has been sold to a lot.

Context: Here is how I describe what I am selling: [paste].

Task: Push back. What is vague, what is unproven, what would you need to see before you believed it. Do not be nice about it.

Format: Direct objections, hardest first. Then the three I should have an answer ready for.

> **TIP.** *This one stings, and it is the most useful twenty minutes before any launch.*

3.5

THE PROPOSAL FROM THE CALL

THE SCENARIO. The call went well. They asked for a proposal. You have notes and no evening.

OPEN. Web, desktop, or mobile, in your Business Brain Project so it uses your real offers and prices.

START WITH Opus 5 on High effort.

Role: You are my proposal writer.

Context: I spoke with [who] about [what]. My notes: [paste]. The offer that fits is [offer name, as it appears in my files].

Task: Draft the proposal. Lead with their problem in their words, then what we will do, then what it costs and what happens next. Pull prices and inclusions only from my project files. If anything is missing, say so instead of inventing it.

Format: One page. Their situation. What we will do. Investment. Next step. Then a list of anything you could not find in my files.

TIP. *The "only from my files" line is what keeps a proposal from quoting a price you never set. Never let it guess a number.*

3.6

THE CLIENT QUESTION, IN MY VOICE

THE SCENARIO. A client asked something. It deserves a real answer and you have four other things open.

OPEN. Web, desktop, or mobile, in your Business Brain Project.

START WITH Sonnet 5 on High effort.

Role: You are me, replying to a client.

Context: Here is what they asked: [paste]. Here is what I know about their situation: [notes].

Task: Draft the reply in my voice, matching the writing samples in my project files. Answer the actual question first. If the honest answer is "it depends," say what it depends on.

Format: Under 200 words. One clear next step at the end. Then one line: anything I should double check before sending.

TIP. *Read it once before you send it. Claude drafts. You decide. That one never moves.*

SECTION 4

TRANSCRIPTS AND RECORDINGS

Every meeting you record is already a document. Upload the transcript and let it do the part you were never going to do.

4.1

THE MEETING RECAP WITH ACTIONS

THE SCENARIO. The call happened. Everyone agreed to things. Nobody wrote any of it down.

OPEN. Web, desktop, or mobile. Upload the transcript file or paste it in.

START WITH Sonnet 5 on High effort.

> **Role:** You are my operations coordinator.
>
> **Context:** Attached is the transcript from [what meeting, who was on it, when].
>
> **Task:** Turn this into a recap. Every action item needs an owner and a due date. Where the transcript does not name one, write OWNER TBD or DATE TBD. Do not guess and do not invent an owner.
>
> **Format:** Where things stand, in three lines. Decisions made. Action items as a table with Owner, Action, Due. Open questions nobody answered.

> **TIP.** *"Do not guess and do not invent an owner" is the whole ballgame. Without it you get a tidy list of things nobody actually agreed to.*

NEXT MOVE. *Which of these will quietly slip if nobody follows up this week? Rank by risk.*

4.2

THE SALES CALL TEARDOWN

THE SCENARIO. The call did not close and you are not sure whether it was the price, the pitch, or you.

OPEN. Web, desktop, or mobile, in your Business Brain Project so it knows your offer.

START WITH Opus 5 on Extra effort.

> **Role:** You are a sales coach reviewing my call, and you are not here to make me feel good.
>
> **Context:** Attached is the transcript of a sales call with [who] about [what]. The outcome was [closed, no, thinking about it, ghosted].
>
> **Task:** Pull out every objection they raised, including the soft ones they said sideways or buried in a compliment. For each one, tell me how I actually responded and what would have worked better. Then tell me where I talked too much, where I missed a buying signal, and the moment the call turned.
>
> **Format:** Objections as a table: what they said, what they meant, how I answered, what to say next time. Then Where I lost it. Then the three things to do differently on the next call.

> **TIP.** *The soft objections are the ones worth finding. "This is really interesting, let me think about it" is an objection wearing a nice coat.*

NEXT MOVE. *Write me the follow-up email that answers the objection I handled worst.*

4.3

THE OBJECTION PATTERN ACROSS EVERY CALL

THE SCENARIO. You have a folder of call transcripts and a feeling that the same thing keeps happening.

OPEN. Desktop app. Connect the folder of transcripts and describe the outcome.

START WITH Opus 5 on Extra effort.

> Read every call transcript in this folder. Find the objections that come up in more than one call and rank them by how often they appear and how often they ended the conversation. For each one, tell me how I usually answer it and whether that answer is working, based on what actually happened on the calls where it came up. Then tell me what is missing from my offer or my messaging that keeps causing it.

> **TIP.** *One call tells you about one prospect. Ten calls tell you about your offer. This is the prompt that finds the hole in your messaging.*

4.4

THE TRAINING YOU RECORDED

THE SCENARIO. You taught something good on a call and it is sitting in a recording nobody will ever watch again.

OPEN. Web, desktop, or mobile, in your Project. Upload the transcript.

START WITH Opus 5 on High effort.

Role: You are my content producer.

Context: Attached is a transcript of me teaching [topic] to [audience].

Task: Pull out every teachable idea in here that could stand on its own. Keep my actual phrasing wherever it is good, I would rather sound like me than sound polished.

Format: A list of standalone ideas with my own words quoted where they land. Then tell me which three would make the best posts and why.

> **TIP.** *Tell it to keep your phrasing. The parts where you went off-script are usually the parts worth publishing.*

4.5

THE PROCESS YOU EXPLAINED OUT LOUD

THE SCENARIO. You walked someone through how you do a thing on a call. Now it needs to be written down so you never explain it again.

OPEN. Web, desktop, or mobile, in your Project. Upload the transcript.

START WITH Opus 5 on High effort.

Role: You are my operations writer.

Context: Attached is a transcript of me explaining how we [the process] to [who].

Task: Turn it into a step-by-step procedure someone could follow without asking me. Number every step. Where I said "usually" or "it depends," pull that out into a separate list of decision points. Do not add steps I did not describe.

Format: Purpose, in one line. Steps, numbered. Decision points. Then a list of anything unclear that I need to fill in.

> **TIP.** *This is how a Brain grows. One call, explained out loud, becomes a file in your Operations tile, and you never say it a third time.*

SECTION 5

THE HANDS-OFF JOBS

Bigger work. You give Claude a goal, it hands back finished files. This is what used to live behind its own Cowork button; if your account still has that button, use it. Otherwise, just describe the goal and hand it off the same way you would in any chat. Either way, Claude reaches files on your computer only while the desktop app is open, so start these on desktop.

5.1

THE MESSY FOLDER

THE SCENARIO. A folder that grew for a year. Receipts, screenshots, half-finished drafts, three versions of the same file.

OPEN. Desktop app. Connect the folder and describe the outcome.

START WITH Sonnet 5 on High effort.

> Look at every file in this folder. Propose a folder structure that would make this findable, tell me which files are duplicates or outdated versions, and flag anything that looks like it does not belong here. Do not move or delete anything yet. Give me the plan first.

> **TIP.** *Always ask for the plan before the action. Then approve it. Claude drafts, you decide, applied to your own file system.*

5.2

THE FOLDER OF CLIENT NOTES

THE SCENARIO. Ten calls' worth of notes in ten different formats. Someone asks what actually got decided.

OPEN. Desktop app. Connect the folder and describe the outcome.

START WITH Opus 5 on High effort.

> Go through every file in this folder. Produce one document with a table of every decision made with its date and source, a table of every open action item with its owner, and a short list of anything raised more than twice and never resolved. Do not invent owners or dates, mark anything the notes do not state as TBD. Save it as Client_Notes_Summary.

> **TIP.** *The "raised more than twice and never resolved" line finds the things everyone keeps avoiding.*

5.3

THE DOCUMENT INTO A DECK

THE SCENARIO. You have a written summary and you need slides by tomorrow.

OPEN. Desktop app. Connect the folder and describe the outcome.

START WITH Opus 5 on High effort.

> Take the document in this folder and build a slide deck for [audience]. One idea per slide. Lead with the conclusion, then the support. Keep every number exactly as it appears in the source. If something is ambiguous, put it on a slide at the end titled Open Questions rather than guessing.

> **TIP.** *"Lead with the conclusion" is what keeps a deck from turning into a report with bullet points.*

5.4

THE WEEK YOU BUILT INTO CONTENT

THE SCENARIO. You did the work all week. Now it needs to become something people see.

OPEN. Desktop app or web. Hand off the batch, or ask in plain chat for one quick post.

START WITH Sonnet 5 on High effort.

> Here is what I built, tested, or figured out this week: [notes, screenshots, messy bullets, whatever you have]. Turn this into [number] posts recapping it in my voice. Lead with what changed, not what I did. One post per platform I name, each under [length]. Flag anything that reads more like a claim than something I actually tested.

> **TIP.** *When this works twice, schedule it. That is the whole path: prompt, then repeatable job, then something that runs without you.*

SECTION 6

THE CHROME EXTENSION

The extension puts Claude into your browser tab. It reads what is already on your screen, so you stop moving text between windows.

6.1

THE COMPETITOR'S PAGE

THE SCENARIO. You want the gist of what someone else is doing, and what matters to you, not a full teardown.

OPEN. Chrome, the Claude extension, on the page you are looking at.

START WITH Sonnet 5 on Medium effort.

> Summarize this page. Then tell me the three things on it that would matter to a business like mine, and flag anything that reads like marketing rather than fact.

> **TIP.** *This is what the extension is for. Claude reads what you are already reading.*

6.2

THE PAGE YOU ARE ALREADY READING

THE SCENARIO. A guidance page, a help doc, an article someone sent you. You want to understand it, not skim it.

OPEN. Chrome, the Claude extension, on the page itself.

START WITH Sonnet 5 on High effort.

> Summarize this page. Tell me what it requires or recommends, what is new, and what I would need to do differently based on it.

> **TIP.** *Do not copy and paste it into a new chat. That is the whole point of the extension.*

6.3

STEAL THE STRUCTURE, NOT THE WORDS

THE SCENARIO. A page that converts well, and you want to know why.

OPEN. Chrome, the Claude extension, on the page.

START WITH Opus 5 on High effort.

> Break down how this page is built. What order does it make its argument in, what objection does each section handle, and where does it ask for the sale. Do not copy any of its wording. I want the structure so I can build my own version in my own words.

TIP. *Structure is fair game. Wording is not. Ask for the skeleton and write your own copy onto it.*

SECTION 7

THE CHAINS

Every prompt in this pack works on its own. Run them in order and each one hands its output to the next. That is where the time actually comes back.

FROM THE CALL TO THE CLOSE

1. Before the call: Prep Me for This Call (3.1). Walk in knowing their goals, yours, and where the friction is.
2. After the call: The Sales Call Teardown (4.2). Upload the transcript. Find the objections you missed while you were talking.
3. The next morning: The Proposal From the Call (3.5). Prices and inclusions from your files only, never from memory.
4. When they go quiet: The Follow-Up You Keep Not Sending (3.2). Something useful first. Never an apology.
5. When they ask: The Client Question, in My Voice (3.6). Answer the real question before anything else.

> **TIP.** *The teardown becomes the context for the proposal. The proposal becomes the reference point for the follow-up. Run a chain in one chat, or paste the last output into the next prompt, so none of it depends on memory.*

ONE RAMBLE INTO A MONTH OF CONTENT

1. Talk it out: The Ramble Into a Brief (1.6). Six messy minutes on the microphone.
2. Multiply it: A Week of Content From One Idea (2.1). Paste the brief. Five angles on one idea.
3. Sharpen the openers: Hooks That Actually Stop People (2.2). Run it on the two weakest posts.
4. Strip the inflation: Say It Without the Hype (2.5). Cut every claim you cannot back up.
5. Close the loop: The Week You Built Into Content (5.4). Then schedule it. That is Part Four.

> **TIP.** *When a chain works twice, it is a scheduled job waiting to happen. Prompt, then repeatable job, then something that runs without you.*

FROM ONE CALL TO A FILE IN THE BRAIN

1. Explain it once: The Process You Explained Out Loud (4.5). Upload the call where you walked someone through it.
2. File it: save the procedure into your Operations tile. Now it is true, and Claude can read it.
3. Teach it: the instructions you keep repeating around that process become a skill. Part Four shows you how.

> **TIP.** *Brain. Staff. Scale. This is what the order looks like at the size of a single task.*

WHEN IT GOES WRONG

SIX THINGS THAT ARE NOT BROKEN

Every one of these comes up in the Lab. None of them is Claude being broken, and all of them are fixed in one move.

"It gave me something generic."

WHY. You gave it something generic. Claude mirrors the specificity of what it gets.

THE FIX. Run it through the Work Order. Say who it is for, paste one example of good, and say what you do not want. Then run it again in the same chat.

"It sounds like AI."

WHY. There are no voice samples in the room, so it writes like the average of everything it has ever read.

THE FIX. Put two real emails in your Project files and tell it to match them. Then run Say It Without the Hype (2.5) and cut the inflation.

"It made up a number."

WHY. Given a gap, it fills it. It is not lying, it is completing the pattern.

THE FIX. The line in your instructions: if it is not in the files, say so. Then check every figure against the file before anything leaves your hands. That step never moves.

"It will not commit."

WHY. Balanced is the default. It will give you both sides until you ask for one.

THE FIX. Say it plainly: be direct, not polite, pick one and defend it. Then argue back. That is the thought partner part.

"It forgot what I told it."

WHY. Long chats get heavy, and memory does not cross from one Project into another.

THE FIX. Ask for the handoff doc and start a fresh chat. If it matters permanently, it goes in a knowledge file, not in a conversation.

"It did something I did not ask for."

WHY. You switched to Auto, and it kept going. Manual is the default.

THE FIX. Flip back to Manual for anything sensitive, and ask for the plan before the action. Claude drafts. You decide.

KEEP THIS PAGE

YOUR PROMPT LOG

Every time something you typed actually worked, write it down. Patterns show up faster than you expect.

Date and task	What I typed that worked	Where

ANYTHING IN HERE TWICE IS A SKILL. Go back to Part Four and teach it to Claude once, so you never type it a third time. Bring the ones you are stuck on to the next live session.

BEFORE YOU CLOSE THIS

THE NAKED AI SCORECARD

Score yourself. Ten questions about the AI you use today, one for each project from Part Three. Yes or no. One point per yes. Answer fast and answer honestly, nobody is watching.

	Project	The question	Y / N
01	Core	Could your AI write one paragraph about your business you would not edit?	
02	Strategy	Does it know your goals this quarter, and what you are NOT doing?	
03	Sales	Does it know how someone goes from interested to paid in your world?	
04	Marketing	Does it know exactly who you serve, and the words she actually uses?	
05	Client Experience	Does it know what happens after someone pays you?	
06	Operations	Does it know how work moves through your business?	
07	Finance	Does it know how your money gets tracked? Process, not your balance.	
08	Team	Does it know who does what on your team, and how you hire?	
09	Automation	Does it know what already runs without a human?	
10	AI Employees	Does it know which jobs you have already handed to AI?	

MY SCORE: _____ out of 10

Score	Where you are	What it means
0 to 2	RUNNING NAKED	Completely normal. Most founders start here
3 to 6	HALF DRESSED	The pieces exist. The order does not
7 to 10	READY FOR STAFF	Your Brain can hold a hire

zero is not behind. zero is naked. naked is fixable.

Every no is a file you have not written yet. Take the lowest-numbered no and start there.

WHAT'S NEXT

HOW TO WORK WITH US

You do not have to figure out the next hundred prompts alone.

The Lab is where we build this out loud every week. Real tools, real screens, real mistakes, right alongside you. That is the whole point of being in the room instead of reading about it somewhere.

COME TO THE LAB

Free, weekly, live. If you are not in yet, this is the door.

Join here: https://links.sherist.com/events/thesaasylab

STAY FOR THE AFTER-SESSIONS

Already in the Lab? The after-sessions are where we sit with you while you build it, every week. Bring the thing you are stuck on.

Join us: https://links.sherist.com/saasy-sessions

GET THE LATEST

Claude changes fast, and this guide gets refreshed to match. Join the Front Row list and we will let you know when it does.

Join here: https://thesaasybusiness.com/front-row

SHARE IT AND GET PAID

If this guide helped and you know someone else drowning in their own business, you can send them here and earn on it.

Become an affiliate: https://thesaasybusiness.com/affiliate

BOOK A READINESS CALL

If you are looking to put Claude, automations, and AI to work across your whole business and you would rather not build it alone, come talk to me. We will find the right starting point for where you actually are.

Book here: https://links.sherist.com/widget/bookings/readiness-call-with-sherist

Everything else lives here: https://www.thesaasybusiness.com

Come build it with us.

Prepared by Sherist Rodriguez, Coach SaaSy, The SaaSy Business
Claude Certified Architects in progress.