

FRIDAY AI WORKSHOP · WEEK 18

Meet Claude.

Your AI business brain for clients, strategy & content. The beginner's playbook for using Claude with JourneyBuilder.

100% FREE RESOURCE

A companion to the Friday AI Workshop
with **Jay, the AI Guy**

BROUGHT TO YOU BY

Jay.the.AI.Guy

JOURNEYBUILDER · JVI MOBILE MARKETING

Your AI business brain — built for people who run things.

Claude is an AI assistant from a company called Anthropic. Think of it as a really smart, really fast new employee... one who remembers everything, never gets tired, and writes in your voice once you teach it how.

Why local business owners love it

- **Projects** — long-term "folders" that hold info about each client, your brand, and your business. Claude remembers everything you put in.
- **Artifacts** — a side panel where Claude writes, edits, and previews documents in real time.
- **File uploads** — drop in PDFs, screenshots, spreadsheets, contracts. Claude reads them.
- **Sounds like a human** — really good at matching tone, voice, and style.
- **Free plan available** — start today with zero risk.
- **Pairs with JourneyBuilder** — generate content/strategy in Claude → execute in JourneyBuilder.

Built for non-technical users. No code, no API, no prompt engineering required. If you can chat, you can use Claude.

Pricing at a glance

HEADS UP Pricing and features change. Verify current details at claude.com/pricing before subscribing.

Free

ALL YOU NEED TO START

- ✓ Claude Sonnet (same model that powers most Pro use)
- ✓ Up to 5 Projects with knowledge files
- ✓ File uploads (20 files per chat, 30MB each)
- ✓ Artifacts
- ✓ Custom Styles (presets + your own)
- ✓ Web Search
- ✓ Memory across conversations
- ✓ ~30-100 messages per day

Pro

WHEN YOU'RE READY

- + Per-Project custom instructions
- + Unlimited Projects
- + Opus model access (their most powerful)
- + ~5x higher usage limits
- + Extended Thinking for complex problems
- + **Privacy controls** — opt out of training data usage
- + Early access to new features

JAY'S TAKE Start free. Use it for a week on real client work (with sanitized data). If you find yourself wanting more Projects, hitting usage limits, or working with sensitive client info... upgrade to Pro. Most small business owners get instant ROI in their first week.

Getting started in 5 minutes.

From sign-up to your first real piece of work — five steps. No fancy setup required.

- 1 Go to claude.ai**
Sign up with your email or Google account. The free plan needs no credit card.
- 2 Have your first chat**
You'll land in a chat box. Type something specific — not "what can you do" but a real question:

"I run a [your business] in [your city]. Give me 5 ways to bring in more customers this month for under \$500."
- 3 Notice the Artifacts pane**
For longer responses, Claude opens a side panel where the content lives. You can edit, copy, and download from there.
- 4 Try a file upload**
Click the paperclip icon. Upload a PDF — a contract, a brochure, a recent invoice. Then ask Claude to summarize it, find specific info, or draft something based on it.
- 5 Click "Projects"**
This is the unlock. Turn the page to set up your first one.

✓ **FREE PLAN** Everything on this page works on the free plan. You don't need to pay a cent to get started — and you can do real client work from day one.

Setting up a Claude Project. The game-changer.

A regular chat with Claude forgets everything when you close it. A Project remembers — it holds onto files and context across every chat inside it. **One Project per client = a permanent AI workspace for that client.**

✓ **FREE PLAN** You can have up to **5 Projects** on free. Pick your top 5 active clients. Pro removes the limit.

The free-plan workflow

1 Set Profile Preferences (one-time, 2 min)

Settings → Profile. This is where you tell Claude about *you* — your role, your brand voice, your universal rules. Applies to every conversation.

"I'm a digital marketing consultant in Greensboro, NC. My voice is friendly, casual, no jargon. I sign emails 'Talk soon — Jay.' Never use emoji in client emails. Default to short, direct writing."

2 Click "Projects" → "Create Project"

Name it after the client. Example: **"Tony's Pizza — Client File"**

3 Create a "Client Context" knowledge file

This is the key free-plan move. Create a one-page doc with everything Claude needs to know about this client:

"This Project is for Tony's Pizza, a family-owned pizzeria in Greensboro, NC, in business 12 years. Target customer: local families and downtown lunch crowds. Voice: warm, casual, proud of Italian-American heritage. Owner Tony prefers short emails, signed 'Talk soon — Jay.' #1 priority: increasing weeknight dinner traffic. They do NOT run paid ads. Don't suggest video content — Tony hates being on camera."

Save as **Tony_Pizza_Context.docx**, upload to the Project.

4 Add more knowledge files

Intake form · pricing sheet · 2-3 recent emails · brand style guide · website screenshots · past campaign results.

5 Start chatting

Every chat inside this Project will now reference everything above. Try one of these:

"Draft a friendly check-in email to Tony. Reference our last conversation and propose two times to chat next week."

🔒 **PRO UPGRADE INSIGHT** Pro users can skip Step 3 entirely — every Project has its own **Project Instructions** box. Type the context directly into the Project. Cleaner workflow, but the free method works great.

6 beginner-friendly features to master.

All six work on the free plan. Master these and you're already ahead of 90% of people using AI for business.

P

Projects

FREE

Persistent workspaces with their own files and context. Free plan: up to 5. (See Page 3.)

A

Artifacts

FREE

When Claude writes anything longer than a paragraph, it appears in a side panel. Edit it, copy it, download it, or ask Claude to revise specific sections.

F

File Uploads

FREE

Paperclip icon (or drag-and-drop). PDFs, images, spreadsheets, Word docs. Free plan: 20 files per chat, 30MB each.

S

Custom Styles

FREE

Teach Claude how YOU write. Click "Use style" → "Create custom style." Upload writing samples or describe your style. Available to all users.

M

Memory

FREE

Claude can remember context across conversations (not just within one chat). Manage it in Settings → Memory.

W

Web Search

FREE

Toggle in your chat tools to let Claude search the web in real time. Useful for fresh data, fact-checking, and competitor research.

Pro-only features worth knowing about

Not required for the 102 workflow, but here's what unlocks when you upgrade:

+

Per-Project Custom Instructions

PRO

Paste your client context directly into the Project — no file upload needed. Also adds unlimited Projects, Opus, Extended Thinking, higher limits, and data privacy controls.

7 quick wins for local business.

Pick ONE this weekend. Just one. That's how you actually get value out of AI — you stop watching, and you start using.

Win 01**Client Profile Projects**

One Project per active client. Drop in everything you know. Now you have a memory that knows them better than you do.

Win 02**Email Reply Drafts in 60 Sec**

Paste any client email into Claude. Say: "Draft my reply. Warm, brief, two meeting-time options." Done.

Win 03**One Idea → Five Pieces**

Take a blog post, podcast, or video. Spin it into a short blog, an email, 5 social posts, a video script. Drop them into JourneyBuilder.

Win 04**On-Demand Strategy**

"Here's my client. Here's their goal. Here's their budget. Give me 5 campaigns." Use this for new clients, slow months, or stuck moments.

Win 05**SOPs in 10 Minutes**

Record yourself doing a task. Transcribe it. Drop the transcript into Claude. Ask for a step-by-step SOP. Send to your team.

Win 06**Sales Page Copy**

Paste in your offer, customer profile, and pricing. Ask Claude for sales page copy. Drop it into a JourneyBuilder funnel.

Win 07**Review Responses + FAQ Pages**

Paste in your top 20 customer reviews. Ask Claude to write 5 review response templates and an FAQ page based on the patterns. Full review management content in 5 minutes.

YOUR HOMEWORK Pick ONE of these seven and try it this weekend. Just one. Don't try to do all seven. That's how AI dies in your business — you go too wide, get overwhelmed, and quit. One win this weekend... then build from there.

Jay's pro tips. Then pair it with JourneyBuilder.

1 Treat Claude like a new employee

Don't write fancy "prompts." Brief Claude like a smart new hire. *"Here's the situation, here's what I want, here's the audience, here's the tone. Go."*

2 One Project per client

This is the workflow that changes everything. Set up Projects for your top 5 clients this week.

3 Iterate, don't restart

If Claude's answer isn't right, don't start over. Just say "shorter," "more casual," "add a CTA," or "try again, but for a different audience." It'll keep refining.

4 Upload your brand voice

Drop 3-5 of your best past emails or posts into a Project as files. Tell Claude: *"This is how I write. Match it."* Your output will instantly sound more like you.

5 Always verify facts

Claude is great at writing and thinking, but it can occasionally get a fact wrong. For anything where accuracy matters — pricing, names, dates, stats — double-check before publishing.

Where Claude outputs go in JourneyBuilder

Claude Output	Where It Goes in JourneyBuilder
Email drafts	Email campaigns + automated sequences
Blog posts	Website / landing page content
Social posts	JourneyBuilder social planner / scheduler
Sales page copy	Funnel pages
Voice/Chat agent scripts	AI Voice Agent or Chat Agent setup
FAQ content	Website FAQ + chat agent training
Review templates	Review management workflow
SOPs + strategy docs	Team training + internal CRM notes

Want help wiring all this together?

The JourneyBuilder team does full setups — Claude on the thinking side, JourneyBuilder on the execution side, all wired together — so you can save hours your first week.

[BOOK A DISCOVERY CALL →](#)