

WEEK 2

The Crew Setup Guide

Give your handbook a permanent home

What You're Building

The Crew is a **workspace inside the AI tool you already use**, where your business handbook lives permanently and every employee you hire reads it automatically.

You are not buying anything. You are not switching tools. Twenty minutes, once.

WHY A DOCUMENT ON YOUR DESKTOP ISN'T ENOUGH

You wrote the handbook last week. If you leave it sitting in Google Docs, here's what happens:

Day	What happens
Monday	You paste the handbook, ask your question, get a great answer
Tuesday	Same thing. Still working.
Wednesday	You're in a hurry. You skip it. The answer is generic. You think "eh, close enough."
Thursday	You don't open the doc at all
Week 3	You're back to the vending machine

Three reasons it dies:

1. **Friction.** Thirty seconds of copy-paste is enough to skip when you're busy.
2. **Drift.** You update the doc, but the version you pasted into that chat last week is the one the AI is still using.
3. **No compounding.** Every conversation starts from zero, so the AI never gets better at being *your* AI.

Every system that depends on you remembering to do something is a system that fails. Not might fail. Will.

SAME IDEA, FOUR NAMES

Your tool	What to build	Cost
Claude	a Project	Paid plan
ChatGPT	a Custom GPT or a Project	Paid plan
NotebookLM	a Notebook	Free tier is real
JourneyBuilder	a Knowledge Base on an AI agent	Included with AI Employee

Pick the one that's already open. The workspace is the asset — the tool is just where you keep it.

Which One Should You Pick?

If you genuinely have no preference, here's the honest breakdown.

Best at	Writing that sounds like you	Breadth, plugins, team use	Citing its sources
Free tier	Limited	Limited	Genuinely usable
Knowledge limit	Large	Large	Up to 50 sources
Shareable with team	Team plans	Team plans	Yes, free

Where it falls short	Fewer integrations	Voice drifts more	Can't <i>do</i> things, only answer
Pick it if	Content is your main job	Your team already lives there	You need receipts on every answer

Jay's honest take: I use Claude because most of what I ask for is writing, and it holds a voice better. But I am not here to sell you my preference — the handbook is the asset and it works in all three.

The one thing that would actually change your mind: if you need to *prove* where an answer came from — regulated industry, client deliverables, anything where “the AI said so” isn’t good enough — NotebookLM is the only one of the three that cites a source for every sentence. That’s a real differentiator and it’s free.

DON'T TOOL-SHOP

The single most common way people fail this week is spending the twenty minutes comparing tools instead of building. **Flip a coin if you have to.** You can rebuild The Crew somewhere else in fifteen minutes later — the handbook moves with you.

Build It in Claude

Time: about 10 minutes.

- 1. Create the Project.** Projects → Create Project. Name it `The Crew`.
- 2. Add the custom instructions.** These are standing orders, not the handbook.

You are part of The Crew, the AI team for [BUSINESS].

Every response follows the Crew Handbook in this project's knowledge. Never invent prices, services, or claims that aren't in the Handbook. When you don't know something, say so and ask me rather than guessing.

Write the way I write – see the samples in Section 5.

- 3. Upload the Crew Handbook** to project knowledge.
- 4. Add 3-5 supporting sources** (see Page 6 for what to add).
- 5. Test it.** Ask something you asked last week.

Notice what you didn't do: you didn't paste anything. You're never pasting that handbook again. That's the whole week.

Watch for: Claude Projects are per-plan. On a Team plan, put The Crew in a shared project so Ryan and Heather use the same brain — that's the entire point.

Build It in ChatGPT

Time: about 10 minutes.

Two ways to do this. Projects are newer and simpler; Custom GPTs are more shareable.

OPTION A — A PROJECT (SIMPLER)

1. Projects → New Project. Name it `The Crew`.
2. Add instructions — the same block from Page 3.
3. Upload the Crew Handbook and your supporting sources.
4. Start a chat inside the project and test.

OPTION B — A CUSTOM GPT (MORE SHAREABLE)

1. Explore GPTs → Create.
2. **Configure** tab — don't use the conversational builder, it'll talk you in circles.
3. **Name:** The Crew. **Description:** one line.
4. **Instructions:** the same block from Page 3.
5. **Knowledge:** upload the Handbook and sources.
6. **Capabilities:** turn OFF DALL·E and Code Interpreter unless you need them — fewer moving parts, fewer odd detours.
7. Save → **Only me** (or *Anyone with the link* if you want your team on it).

Watch for: ChatGPT drifts out of your voice faster than Claude across a long conversation. The fix is a line in your instructions: *"If this conversation runs long, re-read the voice samples in Section 5 before writing anything new."*

Build It in NotebookLM

Time: about 5 minutes. This is the fastest of the three, and it's free.

1. **New notebook.** Name it `The Crew`.
2. **Add sources** — upload the Crew Handbook, then paste the URLs of your key web pages. NotebookLM will pull them in.
3. **Ask a question.**

That's it. There's no instructions field, which is why it's fast and also why it's limited.

WHAT NOTEBOOKLM IS GENUINELY BEST AT

It cites everything. Every answer comes with a footnote pointing at the exact source passage. Click it and you see the sentence it came from.

That matters more than people expect:

- You can **check** whether an answer is real in two seconds
- You can hand output to a client and show where it came from
- When it gets something wrong, you can see *which source* confused it and fix that source

WHERE IT FALLS SHORT

- **No standing instructions.** You can't tell it "always write in my voice" once — you say it every time.
- **It answers; it doesn't produce.** It's a research assistant, not a content marketer.
- **50-source cap.** Plenty for most businesses, worth knowing.

The practical move: a lot of people end up with NotebookLM as their *reference* Crew and Claude or ChatGPT as their *working* Crew. That's a perfectly good answer, and both read the same handbook.

What to Put In The Crew

Your handbook is the foundation. These are the supporting sources that make it sharp.

ADD THESE

- ☐ **The Crew Handbook** — always first
- ☐ **Your 3-5 best web pages** — services, about, the one that converts
- ☐ **Real customer emails you're proud of** — 3-5, voice gold
- ☐ **Your FAQ**, if you have one written anywhere
- ☐ **A sales script or call outline**, if you use one

- ☐ **Your best proposal or quote**, with the client details removed
- ☐ **Your pricing sheet** — the internal one, not the marketing one

DON'T ADD THESE

- **✗ Everything.** Fifty mediocre sources are worse than five good ones. It's a signal-to-noise problem.
- **✗ Anything with customer personal data** — names, card numbers, addresses, health details
- **✗ Passwords or credentials.** Obviously, and yet.
- **✗ Outdated price lists.** The most expensive mistake in this whole system is an AI quoting last year's prices.
- **✗ Competitor content.** You'll end up sounding like them.

The rule: nothing in there you wouldn't email.

KEEPING IT CURRENT

Monthly, 10 minutes. Re-upload the handbook if anything changed. **Same day, every time your prices change** — don't wait for the monthly pass.

The Job Description Template ☆

This is the format you'll use to hire all eight employees. Tear this page out.

ROLE:	You are my _____.
KNOWS:	Read the Crew Handbook. Everything you produce comes from it.
DOES:	1. _____ 2. _____ 3. _____ 4. _____
NEVER DOES:	1. _____ 2. _____ 3. _____
OUTPUT FORMAT:	_____ _____

THE FIVE RULES

1. **One job per hire.** A social media manager and a content marketer are two employees. Vague roles produce vague work.
2. **DOES gets three to five bullets.** Ten bullets is a department, not a job.
3. **NEVER DOES is the most important line, and the one everyone skips.** Every AI horror story you've read lives in the rules nobody wrote down.
4. **OUTPUT FORMAT saves you the most time.** "A table with these four columns" beats "help me with social media" every single time.
5. **Write it in your words.** You're writing a job description for someone who happens to be software.

It's Still Giving Me Generic Answers

Work down this list. It's almost always #1 or #2.

#	Check	The fix
1	Is the handbook actually uploaded?	Not pasted into a chat — <i>uploaded to the workspace</i> . Look at the knowledge panel.
2	Does Section 5 have real writing samples?	Adjectives don't teach voice. Paste in three real things you wrote.
3	Is Section 6 filled in?	The Top 10 Questions are what make answers specific.
4	Are you asking inside the workspace?	A new chat outside the Project doesn't know anything. Easy mistake.
5	Did you tell it what format you want?	"Help me with X" gets vague output. Ask for a specific shape.
6	Is the handbook current?	An old handbook produces confidently wrong answers.
7	Too many sources?	Strip back to the handbook plus your five best. Add back slowly.

THE TWO-MINUTE DIAGNOSTIC

Ask your Crew this:

"Based only on what's in your knowledge, describe my business, who I serve, what I charge, and how I talk. If anything is missing or unclear, tell me which section of the handbook needs work."

Whatever it says is thin **is** thin. Go fix that section. This is the fastest feedback loop in the whole system.

Your 20-Minute Homework

- ☐ Build **The Crew** in one tool — Claude, ChatGPT or NotebookLM
- ☐ Upload the **Crew Handbook**
- ☐ Add **3-5 supporting sources** from the Page 6 list
- ☐ Run the **two-minute diagnostic** on Page 8
- ☐ Fix whatever it told you was thin
- ☐ Write **one Job Description** using the Page 7 template

Don't tool-shop. Pick one and build. You can move later — the handbook comes with you.

Next Friday, October 9 — Hire #1: The Content Marketer. One idea goes in; a blog post, an email, a newsletter and a lead magnet come out, in your voice.

If you've done the two things above, you'll be ready to go in about ninety seconds.

Join our NEW online community: <https://clients.journeybuilder.io/communities/groups/jay-the-ai-guy-community/home?invite=6a9edeef3afa6787f44957a2>