

SWITCHED TO CLAUDE?

DO THESE 5 THINGS FIRST

Exact clicks • about 10 minutes • free to start

1

Turn on memory

Click your name, then Settings, then Capabilities. Switch memory on. It works on every plan, even Free. Claude now carries your business details from chat to chat. Click View and edit memory any time to see what it knows.

2

Import your ChatGPT memory

Go to claude.com/import-memory and copy the prompt. Paste it into ChatGPT, then copy its answer. In a new Claude chat paste that answer after: This is my memory from another AI assistant. Add this information to your memory. About a minute.

3

Make a Project for your business

In the sidebar click Projects, then New project, and name it after your business. Paste the Business Profile prompt from page 2 into the project instructions. Then add your price list, brand voice and common questions as files.

4

Turn on a skill

Settings, Capabilities: make sure Code execution and file creation is on. Then open Customize, then Skills, and switch a skill on. To add your own, click the plus, Create skill, Upload a skill, and pick a ZIP with a SKILL.md inside. 50 free marketing skills by Corey Haines: github.com/coreyhaines31/marketing_skills

5

Take the free course

academy.claude.com is free training from Anthropic. Start with Claude 101: 13 lessons, about 2.5 hours, a quiz and a completion badge. Any plan works and no experience is needed. Next up: AI Fluency, Framework and foundations.

Menu names change as Claude updates. If a label looks different, search Settings for the keyword. Only install skills from sources you trust, and skim the SKILL.md file inside before you upload it.

COPY-PASTE PROMPTS FOR YOUR NEW PROJECT

Fill in the [BRACKETS], paste into Claude, done

BUSINESS PROFILE (paste into your Project instructions)

You are my business assistant. My business: [BUSINESS NAME], a [TYPE OF BUSINESS] in [CITY]. We sell [PRODUCTS OR SERVICES] to [WHO YOUR CUSTOMERS ARE]. Our prices: [PRICES]. Our voice: [FRIENDLY / PROFESSIONAL / PLAYFUL]. Our best customers: [DESCRIBE THEM]. When I ask you to write something, use our voice, keep it short, and never invent prices, dates or promises. If you are missing information, ask me before you guess.

5 STARTER PROMPTS TO TRY INSIDE THE PROJECT

1 Get to know me

Read my business profile. Ask me 5 questions, one at a time, that would make your answers about my business better. Then add my answers to memory.

2 Social posts

Write three Facebook posts announcing [OFFER]: one short, one story, one that ends with a question. Match my voice and keep each under 80 words.

3 Customer FAQ

Here are questions customers keep asking me: [PASTE 5 TO 10 QUESTIONS]. Write a clear FAQ for my website in my voice, with short answers.

4 Win back quiet leads

Write two friendly follow-up texts for people who asked [BUSINESS NAME] for a quote and went quiet. One casual, one professional. No pressure, one simple question at the end.

5 Find missed money

Here is my price list: [PASTE]. Tell me where I may be leaving money on the table, what I could bundle, and one offer to test this month.

YOUR 10-MINUTE CHECKLIST + LINKS

Tick them off, then keep building

- ☐ Memory is on
- ☐ ChatGPT memory imported (or skipped)
- ☐ Project created for my business
- ☐ One skill switched on
- ☐ Claude 101 started

LINKS YOU NEED

Claude: claude.ai
Import your memory: claude.com/import-memory
Free courses: academy.claude.com
How skills work: support.claude.com/en/articles/12512180
50 free marketing skills: github.com/coreyhaines31/marketingskills

BONUS: tools that pair with Claude

Blotato (posts your content everywhere for you): blotato.com/?ref=SocialMedia
Instantly (sends the cold emails Claude writes): refer.instantly.ai/coldcrm

Want the customers to go with the setup?

- Free community, Unlimited Leads: skool.com/unlimitedleads
- Find + verify B2B and consumer leads: EmailClik.com (free forever version)
- Hire me on Fiverr (7,400 orders, 4.9 stars): fiverr.com/keith8935

I sell ready-made lead lists. Message me LIST on Facebook or Instagram.