

My Claude *Non-Negotiables*

The exact settings, folders and habits I use
so Claude actually knows my business.

SET IT UP ONCE, SAVE HOURS EVERY WEEK

Less hustle, more systems.

Why Setup *Matters*

The difference between a clever chat and a real assistant

Most people open Claude, type a question and get a decent answer. Then they open a new chat tomorrow and explain their whole business again. It works, but it never gets better.

The magic happens when Claude already knows you. Your brand, your clients, your offers, how you write and how you like things done. That only happens if you set it up properly, once.

These are the non-negotiables I set up for myself and for every client system we build. None of them need you to be technical. They just need a little time up front.

IN PLAIN WORDS

Setting up Claude is like onboarding a brilliant new assistant. The better the onboarding, the less you have to explain later.

Spend an afternoon setting it up, and save hours every single week after.





Claude Code Over *Chat*

Why I barely use the regular chat window anymore

There are three ways to work with Claude. They all use the same brain, but they work very differently.

Chat

Great for quick questions. Every new chat starts from zero, and it can only see what you paste in.

Projects

A step up. You add files and instructions to a project, so it remembers that topic. But the files are copies, and it cannot change anything for you.

Claude Code, my choice

Claude works directly inside the folders on your computer. It reads your real files, edits them, remembers your rules, connects to your tools and can actually do the work, not just describe it. It also uses fewer tokens, because it only opens the files it needs instead of you pasting everything in.

You do not need to be a developer to use Claude Code. I use it through the Claude desktop app, and I mostly just talk to it.

The Right *Settings*

Two choices that change the quality of everything

01

Pick the strongest model for real work

- Claude comes in a few sizes. Opus is the most capable, Sonnet is faster and lighter
- I use Opus for strategy, writing, building systems and anything important
- Sonnet is lovely for quick everyday tasks when speed matters more than depth
- You can switch models any time, even in the middle of a conversation

If you are unsure, start with the most capable one. Better answers save more time than faster ones.

02

Fill in your personal instructions

- In your Claude settings there is a box that asks what Claude should know about you and how it should respond
- Whatever you write there is read before every single conversation
- Most people leave it empty. It is the easiest upgrade there is

The next page shows exactly what to put in it.

A strong model with no instructions still guesses. Give it both.

Your *Instructions*

What I put in the box that Claude reads every time



Keep it short and specific. Think of it as the note you would leave a new assistant on their first morning.

01

Who you are

- Your name, your business and who you help
- Where you are based and the languages you work in

02

How you write

- Your tone of voice in three words, like warm, direct and a little funny
- Words and habits you never want, like em dashes, exclamation marks or corporate jargon

03

How you like to work

- Give me a recommendation, not ten options
- Ask before sending anything or spending money
- Keep it business only

AN EXAMPLE LINE

Write like a warm, direct friend who knows business. Natural, flowing sentences. No em dashes, no hype, no exclamation marks in client-facing copy.

Build Your *Digital Brain*

It takes forever. It also pays off forever

Claude can only be as good as what it knows. So everything about my business lives in one place, an Obsidian vault on my computer, and Claude works right inside it.

04

What goes in my digital brain

- A home page that links to everything else
- Brand voice, story, offers and prices
- One folder per client, each with an overview note
- Step-by-step processes, research and the books we learn from
- A main instructions file that tells Claude how the vault works and the rules to follow

Organised and connected matters more than big. Link notes to each other, so Claude can follow the trail.

Write it down once, and Claude can use it forever.





The Right Folder, *One Topic*

Why every chat has its own home

When one conversation covers your website, a client, a video and your taxes, Claude gets muddled and so do you. So I keep things separate.

05

How I organise my chats

- Every chat starts in the folder it belongs to, like the website folder or a client folder
- Each folder can have its own short instructions file with the rules for that project
- One topic per chat. The video chat stays about video, the website chat stays about the website
- When a chat gets long, I start a fresh one in the same folder. It still knows the rules

WHY IT WORKS

Claude only reads what it needs from that folder, so answers stay focused, it remembers the right rules, and you use far fewer tokens.

Give It *Access*

An assistant who can only talk is half an assistant

Connect Claude to the tools you already use, and it stops telling you what to do and starts doing it, with you approving the important steps.

Your digital brain

So it knows your business and saves what it learns.

Email and calendar

To sort your inbox, draft replies and find time for calls.

Notion and Drive

For project boards, documents and shared files.

Your website

So it can make changes, check them and publish.

Memory

Claude saves the rules and preferences you teach it, so next time you do not have to repeat yourself.

Access with approval. It does the work, you keep the final say.

Commands Worth *Knowing*

A few shortcuts I use every week

In Claude Code you can type a slash and a word to do something quickly. These are the ones I actually use.

/model

Switch between Opus and Sonnet.

/clear

Start fresh in the same folder when a topic is done.

/compact

Shrink a long chat into a summary, so it keeps going without forgetting.

/resume

Pick up a past conversation where you left it.

/init

Ask Claude to write the instructions file for a new folder.

/memory

See and edit what Claude remembers about you.

MY FAVOURITE HABIT

When you correct Claude, ask it to remember the rule. You teach it once, and it applies it everywhere from then on.

Let It *Check Its Work*

And keep your private life out of it

08

Ask for proof, not promises

- Ask Claude to check its own work before handing it over
- For websites, that means screenshots, a phone-size check and testing the forms
- For documents, ask it to read the finished file back and look for mistakes

09

Keep it business only

- Your digital brain and Claude memory are for business
- Leave out anything personal, like relationships, health or private money
- Never paste passwords or card details into a chat

Trust is built the same way with AI as with people. Check, then delegate more.





My Exact *Checklist*

Tick these off and you are ahead of almost everyone

1

Install the Claude desktop app and open Claude Code

→ Work inside a folder, not a blank chat

2

Choose the most capable model

→ Opus for real work, Sonnet for quick tasks

3

Fill in your personal instructions

→ Who you are, how you write and how you like to work

4

Start your digital brain

→ A home page, your brand, your offers and one folder per client

5

One folder and one topic per chat

→ With a short instructions file in each folder

6

Connect your tools and ask it to remember your rules

→ Then let it check its work before you approve

WANT IT SET UP FOR YOU?

We set up Claude, your digital brain and your AI agents for coaches and consultants, built around the tools you already use.

BOOK A FREE CALL