

THE SMALL BUSINESS OPERATOR'S GUIDE TO CLAUDE.

Get Claude running in your business this week — without hiring a tech team, blowing up your budget, or reading 400 pages of AI hype.

READ THIS FIRST.

If you read nothing else on these 23 pages, read this box.

THE 60-SECOND VERSION

- ▶ **Who this is for.** Owners of 5–50 person businesses who've heard the AI noise and tuned it out. You're not late. You're early.
- ▶ **What you'll get.** A working Claude setup, three workflows running this week, and a 30-day plan to make Claude part of how your business operates.
- ▶ **What it costs.** \$20 a month and about 90 minutes of your time. That's it.
- ▶ **What you should NOT do.** Don't start on the free plan. Don't try to "see if AI can do my whole job" on day one. Don't roll it out to your whole team in week one.
- ▶ **Where to start.** Chapter 4 — Setup in 30 minutes. If you only have ten minutes today, jump straight there.

The rest of this guide is here for when you're ready to do the work properly. There are ten short chapters. None of them are wasted. Most of them have a fake business owner in them — Mary, Dave, Priya, and twelve more — who shows you what an actual SMB doing this looks like. They're not real. The wins are typical.

Three things you'll see throughout:

- **HOT TAKE** Where I tell you what I actually think, not what's polite to say.
- **MEET [NAME]** Where a fake-but-typical SMB owner shows you what this looks like in practice.
- **PROMPT** Where I give you the exact words to copy and paste into Claude.

Read in order or skip around. The setup chapter is the only one you have to do before the others make sense.

"I RUN A BUSINESS. WHY SHOULD I CARE ABOUT CLAUDE?"

You've heard about AI. Of course you have. It's been the loudest thing in the room for two years. Here's why this time is different — and why it matters more for you than for the Fortune 500.

You've heard about AI. Of course you have. It's been the loudest thing in the room for two years.

You also have a business to run. Customers to call back. A payroll to make. Two employees out sick. A vendor who keeps invoicing you for the wrong amount. Somewhere on your phone there's a text from a client that you've been meaning to answer since Tuesday.

So when the AI hype showed up, you did the only sensible thing a business owner can do: you nodded politely and got back to work.

Fair enough. But I have to be straight with you.

The gap between SMBs that are using Claude and SMBs that aren't is becoming the gap between SMBs that survive the next five years and the ones that don't. Not because AI is magic. Because a five-person business that uses Claude well operates like a ten-person business that doesn't. And the ten-person business across the street that's using Claude operates like twenty.

That's not a hype line. That's just math.

MEET MARY

Mary runs a party planning company in Tampa with three employees and a calendar that looks like a knife fight. Every week she was 200+ emails deep, half of them texts from clients who "just had a quick question," and the other half vendor confirmations she had to chase down at 11pm. She paid Pro on a Tuesday, hooked up her Gmail by lunch, and asked Claude to check her inbox every hour and flag anything from a confirmed client or a vendor with a deadline. By Friday she'd recovered 9 hours. By the end of the month she'd booked two extra weddings — because for the first time in two years she had time to actually return calls.

That's the whole pitch. There's a Mary in every industry. Some of them figured this out in 2024. Most of them haven't yet.

The thing nobody tells you about AI as an SMB

Here's what you keep getting wrong about this whole AI conversation: it's been pitched to you like it's a story about big companies.

It isn't.

Big companies are slow. They have legal reviews and procurement teams and security committees. They have a VP of Innovation who needs six months to write a memo about whether to pilot something. By the time a Fortune 500 actually rolls out AI to its employees, the technology has already moved on twice.

You? You can install Claude on your laptop tonight, hook it up to your email tomorrow, and have it doing real work by Friday. That's not a disadvantage. That's the entire game.

Your competitive advantage as an SMB has always been speed. Faster decisions, less politics, no committees. Pair that with Claude and you're not just keeping up with bigger competitors. You're competing one weight class up.

Why Claude specifically (not "AI" in general)

There are a lot of AI tools out there. I'm not going to pretend Claude is the only one or trash the others. But three things matter for what you're trying to do:

One — Claude is built to think carefully through long, messy problems. Most AI tools are great at quick answers. Claude is great at the kind of work where you'd otherwise hand a junior employee a pile of stuff and say "figure this out by Thursday." That's most of what an SMB owner needs.

Two — Claude takes data privacy seriously enough that I'd let it read my email. Anthropic, the company that builds Claude, doesn't train its models on your conversations by default. We'll get into the exact policy in Chapter 9, but you can stop worrying for now.

Three — the desktop app does work for you, not just chat with you. This is the unlock most SMBs miss. There's a feature called Cowork that lets Claude actually go do things — read your inbox, pull data from your spreadsheets, draft replies, run a Monday morning report — while you're somewhere else. That's not a chatbot. That's a coworker.

HOT TAKE

If you're paying a bookkeeper, a marketing consultant, AND a virtual assistant — and they're not using Claude — you're paying 1995 prices for 1995 productivity.

What you'll have by the end of this guide

I'll be honest with you about what this guide is and isn't.

It is **not** a comprehensive manual on every Claude feature. It is **not** a course on prompt engineering. It is **not** a sales pitch — I don't get paid if you sign up.

It **is** the shortest possible path from "I've heard of Claude" to "Claude runs three workflows in my business and I can't imagine going back."

By the time you finish reading you'll have:

- 1** A clear mental model of what Claude can and can't do for an SMB.
- 2** A working setup — Pro plan, desktop app, your email and files connected.
- 3** Three workflows running, picked from the 13 highest-leverage SMB tasks Claude can handle.
- 4** A 30-day rollout plan that ends with a clear "is this worth \$20 a month?" decision.
- 5** Answers to the five fears that stop most owners from pulling the trigger.

If you do this well, the only thing \$20 will buy you cheaper is a lunch.

Turn the page. The next chapter is what Claude actually is, in plain English. It's two pages. You can do two pages.

WHAT CLAUDE ACTUALLY IS, IN PLAIN ENGLISH.

Forget the marketing. Forget the demos. Here's the working mental model you need to use Claude well — and the three things to remember about it.

Most explanations of AI are either too technical (vectors, weights, transformers — okay, I'll see myself out) or too magical (it's like having a brilliant assistant!).

Both are useless. Here's the one that actually helps you use it.

CLAUDE IS A COWORKER WHO READS FAST, WRITES WELL, DOESN'T GET TIRED, AND FORGETS EVERYTHING WHEN THE CONVERSATION ENDS — UNLESS YOU SET IT UP NOT TO.

That's the entire mental model. Read it twice. Everything else in this guide is a footnote on that sentence.

The three things to remember

- 1 It can read whatever you give it.** Files, emails, PDFs, spreadsheets, transcripts, your messy notes. Drag, drop, paste. It reads them like a fast human, not like a search engine.
- 2 It can write whatever you ask for.** Drafts, summaries, plans, emails, proposals, content, even spreadsheets and slide decks. The quality tracks the quality of your brief.
- 3 With the desktop app, it can also do things.** Click around your screen, open apps, send Slacks, pull from your inbox, run scheduled tasks. We'll cover this in Chapter 3.

What it can't do (set expectations now, save headaches later)

It is important you know what you're hiring before you hire it.

- **It doesn't remember yesterday's chat by default.** Each new chat is a fresh brain. Projects fix this — covered in Chapter 3.
- **It doesn't have your bank login.** It can't move money, sign contracts on your behalf, or make any binding decisions. By design.
- **It can confidently get things wrong.** Especially numbers, citations, and any "according to..." claims. Trust but verify. Always.
- **It is not a lawyer or your CPA.** It can draft, summarize, explain. It cannot replace professional judgment on professional matters.

A USEFUL MENTAL SHORTCUT

Imagine you just hired a sharp new MBA grad. Smart, well-read, fast. Knows almost nothing about your business until you tell them. Will sometimes get an answer wrong with total confidence — exactly because they're new and trying to be helpful. Their first month is going to involve some hand-holding. That's Claude. The good news: month one is about 90 minutes long, and they don't ask for equity.

The boss vs. employee framing

Here's the one mindset shift that separates people who get value out of Claude from people who don't:

You are not asking Claude. You are **directing** Claude.

Bad: "Hey, can you help me with marketing?"

Good: "I run a 12-employee plumbing company in Phoenix. Write me three social posts for next week aimed at homeowners thinking about replacing their water heater. Tone: warm, plain-spoken, no jargon. End each one with a question."

The difference between those two prompts is the difference between mediocre output and genuinely useful work. The good news: you don't need to be a "prompt engineer." You just need to brief Claude the way you'd brief a smart new hire on a Monday morning.

HOT TAKE

Most people complain Claude is "meh." Then you look at their prompts and they're all five-word questions. Claude isn't meh. Their briefs are.

One last thing before we move on. Claude is changing fast. Anthropic ships new features roughly every six weeks. Some of what's in this guide will be slightly different by the time you read it. The fundamentals — projects, prompts, your inbox — will not change. The cosmetics will.

THE CLAUDE APP: A QUICK TOUR.

Five minutes of reading and you'll know what's in the app, what's worth using on day one, and the one feature most owners don't know exists.

Open Claude and you'll see four things that matter. Everything else is decoration. Let's go through them.

Web app vs. desktop app vs. mobile

You can use Claude in three places: a web browser at claude.ai, the desktop app on Mac or Windows, and the mobile app on your phone.

Use the **desktop app** as your home base. It does everything the web does, plus the powerful Cowork feature, which is the whole reason this guide exists. The web app is a fine backup. Mobile is great for quick stuff in the car or between meetings, but you wouldn't run your business from your phone — don't run Claude from there either.

The four things in the app worth knowing about

1. CHATS

The thing in the middle of the screen. Where you talk to Claude. Each chat is a fresh conversation. Don't over-think it: when you start a new task, start a new chat. When you're continuing the same task tomorrow, continue the chat from yesterday.

2. PROJECTS

This is the big one most owners miss. A Project is a folder with a brain. You drop in your customer list, your pricing sheet, your brand guidelines, your last three proposals — and Claude remembers all of that across every chat in that project. The size of the brain is roughly a 500-page book. That's enough to fit your entire small business in one project.

Why this matters: every time you start a chat in the project, Claude already knows your business. You don't have to re-explain it. The first time you experience this, you'll feel like you've been doing it wrong this whole time.

3. COWORK (PRO+, DESKTOP-ONLY)

This is the unlock. You give Claude a goal — "go through last week's emails and draft replies to anything from a customer" — and it actually does it. Multi-step. Across apps. Comes back with

finished work. You can also schedule Cowork tasks: "every Monday at 7am, build me a sales summary from HubSpot and email it to me." You set it up once. It runs forever.

If you skip every other feature in this list, do not skip this one.

4. CONNECTORS

Plugs Claude into the apps you actually use: Gmail, Google Drive, Calendar, Slack, Notion, and a growing list of others. Once you connect one, Claude can pull from it during any chat — search your emails, read your docs, check your calendar. Each action requires your approval, so nothing happens behind your back.

ONE THING MOST OWNERS MISS: ARTIFACTS

Claude can build small interactive tools, dashboards, and one-pagers right inside a chat. No coding required. You describe what you want, Claude builds it. You can save it, send it, or embed it on your site.

Real examples a normal SMB owner can build in 10 minutes:

- A hiring scorecard for your interview panels
- A quote calculator for service jobs
- A one-page dashboard for your top numbers

We'll come back to artifacts in Chapter 6.

What the app looks like in practice

You're going to spend most of your time in three windows:

- A chat window inside a project (most of your typing happens here)
- The Cowork tab (when you want to assign Claude a multi-step task)
- A scheduled tasks panel (where you set up the recurring stuff)

That's it. There are settings menus and a sidebar full of past chats and other things, but you can ignore them on day one. Don't let the surface area scare you. The 80/20 of value lives in those three places.

HOT TAKE

"Where do I start?" Pick a project. Drop in three documents about your business. Start a chat. That's it. Day one done.

SETUP IN 30 MINUTES.

Five steps. One half-hour. By the end of this chapter, Claude is open on your desktop, hooked up to your email, and you've made it do something useful. No skipping.

This is the chapter that turns reading into doing. If you've made it this far, you owe yourself the half hour. Block it on your calendar. Close Slack. Let's go.

Step 1 — Buy Pro. Right now.

Go to claude.ai/pricing. Click Pro. \$20 a month.

I know your instinct is to start on the free plan. Don't. Free is a demo, not a tool. It doesn't include Cowork — which means it's missing the whole reason you're reading this guide. The math is simple: at \$20 a month, Pro pays for itself the first time Claude saves you 30 minutes. That happens on day one.

Skip Team for now. Team is for when you have three or more people who'd use Claude regularly. We'll get there in Chapter 8. For now, your name on the credit card.

HOT TAKE

\$20 is the cheapest hire you'll make this year. It also doesn't quit, doesn't ghost you, and doesn't need health insurance.

Step 2 — Install the desktop app.

Go to claude.ai/download and grab the version for your operating system (macOS or Windows). The download is small. Install it like you would any other app.

First launch: sign in with the same email you used for Pro. You'll see a clean window with a chat box in the middle. That's home base.

One toggle to flip on first launch: turn on Cowork access when prompted. (If you missed it, you can find it in Settings.)

Step 3 — Connect your work.

Go to Settings → Connectors. Click **Gmail**. Click **Google Drive**. Click **Calendar**. (If you're on Microsoft 365, the equivalents are there too.)

Each one takes you through a permissions screen. Read it. Approve it. The first time you do this it might feel like a lot — Claude is asking for permission to read your email, after all. But every action Claude takes still requires your explicit confirmation, and connections are revocable in one click. We'll cover the privacy details in Chapter 9.

Step 4 — Create your first Project: "About my business."

Click **+ New Project**. Name it: About [Your Business Name].

Drop in five documents:

- 1** Your one-pager or About page (whatever describes what your business does)
- 2** Your pricing or rate sheet
- 3** Your last three proposals or quotes
- 4** A list of your top 10 customers (just names and what they buy)
- 5** A short note in your own words: "Here's how I sound when I write. Here's the tone I want Claude to use. Here are five phrases I'd never use." (Three sentences each is plenty.)

Click save. You just gave Claude a working knowledge of your business. Every chat in this project from this point forward starts already knowing it.

Step 5 — Run your first Cowork task.

Click the Cowork tab. New task. Paste this prompt:

YOUR FIRST COWORK PROMPT

```
Look through my last 7 days of email. Tell me which threads I haven't replied to, ranked by how important the sender is – clients first, vendors with deadlines second, internal team third, marketing/newsletters last. Don't draft replies yet. Just give me the ranked list with one sentence per thread on what it's about.
```

Hit go. Claude opens your Gmail (with permission, every step), scans the threads, ranks them, and comes back with a list. The first time it does this it's a small religious experience.

Look at the list. You'll find at least one thing you forgot. Reply to it. Take 90 seconds. Win the day.

WHAT TO DO IF SOMETHING DOESN'T WORK

Connector won't authorize. Sign out of all your Google accounts in your browser, then try again. 80% of cases.

Cowork tab is grayed out. You're on Free, not Pro. Go back to Step 1.

Claude says "file too big." Split the file. Most files over 50MB or 500 pages need to be chunked.

Anything else. Open a new chat and paste the error message. Claude is unreasonably good at troubleshooting itself.

Total time: 30 minutes. Take a breath. You're now further along than 90% of small business owners in the country. Go to Chapter 5 — that's where this starts paying for itself.

THE 13 SMB TASKS CLAUDE CRUSHES.

Pick three from this chapter. Run them this week. Don't try to do all thirteen at once — that's how busy people fail at new tools. The trifecta to start with: tasks 1, 4, and 7.

Each task gets the same shape: meet someone like you who uses it, what it solves, what to do, the prompt to use, what you get back, and what you save.

Don't read this chapter linearly if you don't want to. Skim the bucket headers. Find the three that match your weekly pain. Bookmark them. Go.

I. INBOX & MEETINGS

1 Triage your inbox in 3 minutes.

TIME SAVED 30–60 min/day **DIFFICULTY** Easy

MEET DAVE

Dave runs an HVAC company outside Cleveland — eight techs, two trucks, one office manager who quit last spring. Every morning Dave was elbow-deep in 60+ emails before he'd even poured coffee: customer complaints, parts back-orders, the supplier asking when he'd pay net-30. He set Claude up to read his inbox at 7am and 1pm and rank everything by "needs Dave today" vs "can wait" vs "ignore." Now he opens his laptop, looks at five things, and is back on the floor by 7:20. He calls it the best \$20 he spends every month.

The pain. You start every morning behind because the inbox decides what you do, not you.

What you do. Set up a scheduled Cowork task to read your inbox at fixed times and rank the threads.

PROMPT

```
Every morning at 7am, scan my unread email from the last 24 hours. Group threads into THREE buckets: (1) Needs me today – clients, urgent vendors, anything time-sensitive. (2) Can wait – can be answered later this week. (3) Ignore – newsletters, marketing, automated notifications. For bucket 1 only, give me a one-sentence summary of what each sender wants. Email me the ranked list.
```

What you get back. A short, ranked email every morning before coffee. Five minutes of reading replaces an hour of inbox panic.

2 Turn meeting notes into action items.

TIME SAVED 45 min/meeting **DIFFICULTY** Easy

MEET TOMÁS

Tomás runs a small architecture firm in Denver — four architects, one admin, a never-ending pile of site-visit recordings. Action items used to fall through the cracks between visits and estimates. Now after every meeting he uploads the recording or his rough notes, and Claude turns it into a one-page client summary with owners, deadlines, and a clean follow-up email he can edit in two minutes. His clients started commenting on how organized he'd become. He didn't. Claude did.

The pain. You leave every meeting with a head full of notes and lose half of them by Wednesday.

What you do. Drop the transcript or recording into a chat. Ask Claude to extract action items, owners, and deadlines.

PROMPT

```
Here's the transcript from my meeting with [client/team]. Pull out: (1) every action item, with the owner and deadline if mentioned, (2) any decisions made, (3) any open questions. Then draft a follow-up email to the participants summarizing those three things. Tone: friendly but business-like.
```

What you get back. A clean action-item list and a follow-up email you can send in two minutes.

3 Draft replies in your voice.

TIME SAVED 60–90 min/day **DIFFICULTY** Easy

MEET JEN

Jen is a solo lawyer in Pittsburgh. She does estate planning. She gets 30+ emails a day and her replies used to take 90 minutes — because she's careful, and because lawyers can't sound like a robot. She loaded her project with five sample replies she'd written herself and a one-paragraph note: "This is how I talk. Don't change it." Now Claude drafts 80% of every reply in her voice. She edits, sends, moves on. Reply time: 15 minutes a day. Same warmth. Same precision. More billable hours.

The pain. Replying takes too long because every email needs to sound like you, not a template.

What you do. Make sure your project has 5 samples of your own writing. Then forward an email into Claude and ask for a draft.

PROMPT

Here's an incoming email. Draft a reply in MY voice, using the samples in this project as reference. Match my tone, length, and the way I open and close emails. If anything is unclear or needs a decision from me, flag it at the top of the reply rather than guessing.

What you get back. A reply that needs 30 seconds of editing instead of 5 minutes of writing.

II. CUSTOMERS & SALES

4 Write proposals and quotes faster.

TIME SAVED 3-4 hrs/proposal **DIFFICULTY** Medium

MEET PRIYA

Priya runs a 6-person branding agency in Austin and was losing deals because her proposals took four days. She loaded her pricing sheet, three winning past proposals, and her brand voice into a Claude project. Now when a lead comes in, she briefs Claude in two paragraphs and gets a custom 6-page proposal in 12 minutes — pricing, scope, timeline, even a personalized intro that references the prospect's website. She edits for 20 minutes and sends. Her win rate didn't go up by a little. It nearly doubled. Speed wins.

The pain. Proposals take days, deals go cold, and you lose business to faster competitors.

What you do. Project has your pricing + 3 winning past proposals. Brief Claude in 2 paragraphs. Edit and send.

PROMPT

New lead: [name, company, what they asked for]. Using my pricing sheet and the three sample proposals in this project, draft a proposal for them. Include: a personalized intro that references their company, scope of work, timeline, pricing, and a clear next step. Match the tone and structure of my best past proposal. About 6 pages.

What you get back. A proposal in 12 minutes that needs 20 minutes of editing. Cycle time goes from days to one hour.

5 Spin up a "voice of the customer" digest.

TIME SAVED 2 hrs/week **DIFFICULTY** Medium

MEET ALICIA

Alicia runs a small ecommerce brand selling reusable kitchenware. Three months in a row, she'd been getting one-star reviews mentioning the packaging — but it was buried in the noise of 200+ pieces of customer feedback a week. She set up Claude to read her support emails, Shopify reviews, and Trustpilot weekly and produce a one-page digest: themes, sentiment shifts, top three complaints. She caught the packaging issue in the first weekly digest. Fixed it in two weeks. Saved her quarter.

The pain. Customers tell you the truth in scattered places, but you can't read every email and review.

What you do. Schedule a weekly Cowork task to pull from your reviews, support inbox, and any social mentions, and summarize themes.

PROMPT

```
Every Monday at 8am, gather customer feedback from the last 7 days across: my support inbox, Google reviews, and any forwarded emails I've tagged "feedback." Produce a one-page digest with: (1) overall sentiment vs. last week, (2) top 3 themes (positive and negative), (3) any individual review that scored under 3 stars. Email it to me.
```

What you get back. A weekly digest that surfaces patterns you'd otherwise miss until they hurt.

6 Win-back nudges.

TIME SAVED 4 hrs/quarter **DIFFICULTY** Medium

MEET SAM

Sam runs a three-location dog grooming chain in Charlotte. He suspected he was losing repeat customers but didn't know the numbers. Claude read his booking export, found 47 customers who hadn't booked in 90+ days, and drafted a personalized "we miss your pup" email for each one — referencing the dog's name and last service. Sam reviewed in 20 minutes, hit send. Twelve customers booked back in within two weeks. Cost: \$20. Returned: about \$1,800.

The pain. Old customers are 5–10x cheaper to win back than new ones — but nobody has time to email them all.

What you do. Export a customer list from your CRM or booking software. Have Claude identify the lapsed ones and write personal emails.

PROMPT

Here's a CSV export from my booking software. Find every customer whose last visit was more than 90 days ago. For each one, draft a short, warm "we miss you" email – reference what service they had last and offer a small thank-you (10% off, free add-on, or whatever you think fits). Keep each email under 100 words. Output as a list I can copy-paste.

What you get back. A batch of personalized emails ready to send. The math almost always works out.

III. MONEY & OPS

7 Make sense of a spreadsheet.

TIME SAVED 2–4 hrs/report **DIFFICULTY** Easy

MEET CARLA

Carla is the bookkeeper for a small commercial contractor in San Antonio. She uploaded six months of QuickBooks data into Claude and asked one question: "What's weird?" Claude flagged a vendor whose monthly invoices had quietly grown by 40% with no corresponding increase in scope. The contractor pulled the records, called the vendor, recovered \$11,400 in over-billing. Carla didn't need a financial degree. She just needed to ask the right person.

The pain. Your numbers tell you stories — but only if someone reads them. Most of yours never do.

What you do. Drop a CSV from QuickBooks (or any spreadsheet) into Claude. Ask the question.

PROMPT

Here's [whatever]: 6 months of expenses by category from QuickBooks. Tell me: (1) the top 3 categories that grew the fastest, (2) anything that looks unusual or worth checking, (3) one chart I should look at to see this most clearly. Output the chart as an image.

What you get back. A summary, an "interesting" list, and a chart. Often catches one real thing in the first try.

8 SOPs on demand.

TIME SAVED 6 hrs/SOP **DIFFICULTY** Easy

MEET DR. PATEL

Dr. Patel runs a two-hygienist dental practice in Sacramento. New hire onboarding was taking two weeks because nobody had ever written down how the front desk actually works. She voice-memo'd herself walking through three days of intake, scheduling, insurance verification, and end-of-day closeout. Claude turned it into a 12-page SOP with sections, checklists, and screenshots-of-our-software placeholders. Her next hire was up to speed in two days. She can't believe it took her four years to write this.

The pain. You have processes. They're in your head. New hires walk into the dark and bump into furniture.

What you do. Voice-memo a walkthrough of how something gets done. Drop it into Claude. Ask for an SOP.

PROMPT

Here's a voice memo of me walking through how we [whatever process]. Turn it into a step-by-step SOP. Include: a one-paragraph summary at top, numbered steps, decision points, and a checklist at the end. Format it so a brand-new hire could follow it on day one. Flag any place where I was vague.

What you get back. A polished SOP you can hand to anyone, today.

9 The financial narrative.

TIME SAVED 3 hrs/month **DIFFICULTY** Medium

MEET EDDIE

Eddie runs a five-person landscaping company in Portland. He doesn't "speak finance" — his words. When his bank asked for a P&L narrative for a credit line, he froze. He uploaded his QuickBooks export and asked Claude to explain his last twelve months in plain English to a banker. The reply was a one-page narrative with a 30/60/90-day cash flow forecast attached. He read it twice, edited two lines, sent it. Got the line of credit on the first try. The bank manager said it was the cleanest narrative she'd seen all month.

The pain. Your numbers exist. The story behind them doesn't — until you need it for a banker, an investor, or yourself.

What you do. Drop in your QuickBooks export. Ask for the narrative. Ask for the forecast.

PROMPT

Here's my last 12 months of P&L. Write me a one-page narrative explaining: what's up, what's down, what's weird, and where I'm headed in the next 90 days. Audience: my bank manager – assume she's smart but doesn't know my industry. End with a 30/60/90-day cash flow forecast in a simple table.

What you get back. A page that reads like your CFO wrote it. Plus a forecast you can show the bank.

IV. HIRING & PEOPLE

10 Hire faster, hire better.

TIME SAVED 8–12 hrs/hire **DIFFICULTY** Medium

MEET HANK

Hank runs a regional plumbing chain in Wichita and needed to hire two journeyman techs. Past hires had taken him two months each — mostly because writing the job post and screening 50 resumes drained his Saturdays. Claude wrote the job post in his voice, generated 12 role-specific interview questions, and ranked 47 resumes against his "must have" criteria in six minutes. Hank interviewed his top six, hired two, was done in two weeks. He told me later he never wants to hire the old way again.

The pain. Hiring is the second-most important thing you do and the one you have the least time for.

What you do. Three quick prompts in the same chat: write the post, generate the questions, rank the resumes.

PROMPT

I need to hire a [role] at my [type of business]. (1) Write the job post in my voice – punchy, no corporate-speak, includes pay range. (2) Generate 12 interview questions specific to this role: 4 technical, 4 behavioral, 4 cultural. (3) When I paste resumes, score each one 1-10 against these must-haves: [list]. Then rank them.

What you get back. A job post, an interview kit, and a sorted resume pile — in one sitting.

V. MARKETING, CONTENT & REPUTATION

11 A week of content in an hour.

TIME SAVED 5 hrs/week **DIFFICULTY** Medium

MEET REGGIE

Reggie owns a regional gym chain — three locations, no marketing person. Mondays used to mean four hours of fighting a blank page for that week's content. Now he picks one idea ("the truth about working out fasted"), drops it into a Claude chat in his branded project, and gets out: a 600-word newsletter, three LinkedIn posts, two Instagram captions, and a customer story prompt. Total time: 45 minutes. Same brand voice across everything. He uses the saved time to actually be in the gym.

The pain. You know content matters. You also know you're not going to write all that.

What you do. Pick one core idea. One prompt produces a week of content across channels.

PROMPT

```
Core idea this week: [your topic]. Using the brand voice in this project, produce: (1) a 600-word newsletter, (2) three LinkedIn posts (different angles), (3) two Instagram captions, (4) one customer-story angle I could pitch a real client on. All in my voice. Output each piece labeled, ready to paste.
```

What you get back. A complete week of channel-ready content from one prompt.

12 Customer research without an agency.

TIME SAVED \$5,000+ vs. agency **DIFFICULTY** Medium

MEET CLAUDIA

Claudia runs an outdoor gear shop in Asheville. She'd been marketing to "experienced backpackers" forever — that was her customer in her head. She fed Claude her actual sales data plus public data on her market and asked for personas. Out came three: yes, the backpacker; but also a "weekend dad" segment that drove 40% of revenue and which she'd never marketed to once. She built a campaign in two weeks. Q3 was her best quarter ever. Personas don't need to cost \$20,000 anymore.

The pain. You market to who you think your customer is, not who actually pays you.

What you do. Drop in real sales data. Ask Claude to build personas based on the data, not on guesses.

PROMPT

```
Here's my sales data for the last 12 months. Build 3 customer personas based ONLY on what this data tells you — not on what someone in my industry might assume. For each: who they are, what they buy, when, why, and one channel I'm probably under-investing in to reach them. Flag anything in the data that surprised you.
```

What you get back. Three data-backed personas and at least one "huh, didn't expect that" finding.

13 Reply to every Google/Yelp/Facebook review in 10 minutes.

TIME SAVED 2–3 hrs/week **DIFFICULTY** Easy

MEET NADINE

Nadine owns three coffee shops in Minneapolis. She'd been ignoring reviews for two years — not out of spite, but because writing 20 thoughtful replies a week was a job nobody had time for. Claude reads her reviews every Friday, drafts replies in her voice that thank specific things customers mentioned, and flags any review under 3 stars for her to handle personally. She spends 10 minutes a week on reviews now and her aggregate rating climbed half a star in a month.

The pain. Replying to every review is high-leverage and low-priority. The math doesn't work — until you stop doing it yourself.

What you do. Schedule a weekly Cowork task. Claude drafts. You skim, edit angry ones, hit send.

PROMPT

```
Every Friday at 9am, pull all new Google/Yelp/Facebook reviews from the last 7 days. For each one, draft a reply in my voice that (1) thanks them by name, (2) references something specific they mentioned, (3) keeps it under 60 words. Flag any review under 3 stars for me to handle personally — don't draft those.
```

What you get back. A queue of polished replies. You hit "post" on the good ones, take five minutes on the bad ones.

THE 3 TO START WITH

Don't try all thirteen this week. Pick the trifecta:

- **Task 1** (Inbox triage) — gets time back immediately.
- **Task 4** (Proposals) — moves money.
- **Task 7** (Spreadsheet sense) — one win compounds across the year.

The other ten can wait until Week 2.

THE UNFAIR ADVANTAGES: PROJECTS, COWORK, ARTIFACTS.

These three features separate "I tried Claude once" from "Claude is part of how my business runs." Skip the basics. Use them right.

The 13 tasks in the last chapter are the workouts. This chapter is the gym. The three features below are what make every workout 3x more effective.

Projects = your business in a folder

Most owners use Claude like a search box: type a question, get an answer, leave. That's like hiring a brilliant consultant and never telling them what your business does.

Projects fix this. A project is a folder with a brain. Drop in your business documents — once — and every chat in that project starts already knowing your business.

The trap: most people make one project called "Work" and dump everything in. Don't. Make **one project per role you'd hire for**. Examples that actually work:

- **Marketing Manager** — your brand voice, past content, customer personas, top competitors
- **Sales Engineer** — your pricing, three winning proposals, FAQ doc, objection-handling notes
- **Office Manager** — your SOPs, vendor list, onboarding docs, employee handbook
- **Quarterly Strategist** — your last four quarterly plans, your numbers, your goals

Each project becomes the thing you'd ask that role. Different chats, same project. Claude shows up to each chat already on the team.

MEET MARISOL

Marisol runs a three-location bakery in San Diego — same brand, different neighborhoods, wildly different customers. She used to repeat herself in every chat: "the La Jolla one is the upscale spot, the Pacific Beach one skews younger, the OB one is foot traffic." She built one project per location. Each one knows that location's vendors, prices, top-sellers, and quirks. Now when she asks "what should we promote at OB this weekend?" Claude already knows OB. She stopped repeating herself. Started getting better answers.

Cowork = the recurring report you stopped doing

Most useful work in your business isn't done in one shot. It's done weekly. Monday's pipeline review. Friday's "what shipped" digest. End-of-month numbers. New customer onboarding emails.

You used to do these. Then you got busy. Now they don't get done.

Cowork is the fix. You set Claude up once — schedule, source, format, recipient — and it runs every Monday morning forever. Your job is to read the output. Claude's job is to do the work.

Three Cowork patterns every SMB should set up in week one:

- 1 Monday morning intelligence brief** — pulled from your CRM, calendar, and email. What happened last week, what's coming this week, who needs you most.
- 2 Friday "what shipped" digest** — for your team, summarizing what got done. Builds momentum without a meeting.
- 3 End-of-month numbers narrative** — pulled from QuickBooks. What's up, what's down, what's weird.

MEET TREVOR

Trevor heads marketing at a 40-person regional insurance agency. He used to spend his Sunday nights manually building a Monday morning sales intelligence report — pipeline, recent wins, anything heating up. Now Claude does it overnight. The report is in his team's inbox at 6am Monday with screenshots from HubSpot, a one-paragraph summary, and three "watch this deal" callouts. He got his Sundays back. The team gets a better report than the one he used to write at 11pm.

Artifacts = build the tools you couldn't afford

This is the feature most SMBs don't know exists. Claude can build small interactive tools, calculators, dashboards, and one-pagers — right inside a chat. No coding. You describe what you want. Claude builds it. You can save it, send it, embed it.

Five real things an SMB owner can build in 10 minutes each:

- **A hiring scorecard** — input candidate scores, output ranked list with notes
- **A quote calculator** — for service businesses with variable pricing
- **A customer feedback tracker** — paste in feedback, get themes and a sentiment score
- **A one-page dashboard** — your top 5 numbers in one view
- **A decision tree** — for support reps handling common questions

MEET RUSS

Russ owns a moving company in Tulsa. Quoting was his bottleneck — every call took 15 minutes of mental math. A consultant quoted him \$4,500 to build a quote calculator on his website. He laughed, then asked Claude to build him one. Twenty minutes later he had a working calculator: square footage, distance, packing options, stairs, piano, weekend premium. He uses it on every sales call now. Quote time: 90 seconds. Price the consultant quoted vs. cost: \$4,480 in his pocket.

THE GOLDEN RULE

Name your projects. Name your files. Name your chats. Most owners skip this. It's the difference between "Claude saves me 5 hours a week" and "Claude is just another tab."

THE 30-DAY ROLLOUT PLAN.

A week-by-week plan so the playbook actually gets used. Not a course. Not a theory. Just four weeks of small moves.

Here's how this usually fails: an owner reads a guide like this one, gets fired up, signs up for Pro, opens Claude on a Tuesday, asks one question, doesn't love the answer, closes the tab, and never opens it again.

Don't do that. Use this plan instead.

Week 1 — Setup and the magic trick

Goal: a working setup and one moment that proves this is real.

- Buy Pro. Install desktop app.
- Connect Gmail + Drive + Calendar.
- Build your "About my business" project from Chapter 4.
- Run your first Cowork task (the inbox triage in Chapter 4, Step 5).
- Show the result to your spouse, partner, or the friend who said this AI stuff doesn't matter.

That last bullet matters more than it sounds. The "magic trick" moment is when this stops being theoretical for you. If you skip it you'll forget by Saturday.

Week 2 — The three core workflows

Goal: three repeatable workflows running daily.

- Pick three tasks from Chapter 5. (Recommended: 1, 4, 7.)
- Run each one daily for the full week.
- At the end of the week, jot one note per task: how much time did this save? What did Claude get wrong? What surprised you?

Resist the urge to add more tasks. Resist hard. Three is the magic number.

Week 3 — Bring in one teammate

Goal: prove the value extends past you.

- Identify the person on your team who'd benefit most. Not the most tech-savvy. The most overworked.
- Block 30 minutes with them. Walk them through your three workflows.
- Help them set up their own equivalent on the Pro plan you already have. (You can share via shared chats; you don't need to upgrade to Team yet.)
- Check back at the end of the week. Did they keep using it?

Week 4 — Decide

Goal: a clean, honest "is this worth it?" decision.

- Track total hours saved across you + teammate.
- Track at least one win that translated to dollars (faster proposal, recovered customer, reclaimed Sundays — pick one).
- Decide one of three things:
 - 1 Stay on Pro.** Working great. Don't fix what isn't broken.
 - 2 Upgrade to Team.** Three or more people using it weekly. Time for shared projects. Chapter 8 has the playbook.
 - 3 Walk away.** If it's truly not landing, cancel. No shame. (Spoiler: in 30 days, almost nobody walks away.)

THE 30-DAY SCOREBOARD

Print this. Tape it to your monitor. Fill it in at the end of each week.

- Hours saved this week: ____
- Dollars saved or earned: ____
- Biggest single win: ____
- Weirdest thing that surprised me: ____

Four numbers, four weeks, one decision at the end. That's the whole plan.

One last reminder: don't try to use Claude for everything in Week 1. The owners who succeed are the ones who pick a small thing and do it every day. The owners who fail are the ones who try to use it for their whole job. You'd never hire a new employee on Monday and ask them to run the company by Friday. Don't do it to Claude either.

WHEN (AND HOW) TO BRING YOUR TEAM ON.

Three signals that you're ready. Three rules for not screwing it up.

If you're reading this chapter, congratulations — you've crossed the line from "AI-curious owner" to "person whose business is meaningfully better because of an AI tool." That's not a small line.

Here's how to roll Claude out to your team without making it weird.

The signal that you should upgrade

Three boxes need to be checked. All three:

- 1** Three or more people on your team would use Claude weekly if they had it.
- 2** You want them to share Projects (not duplicate them across personal accounts).
- 3** You want admin controls — knowing who's using what, billing in one place, the ability to add/remove people.

If all three are true, upgrade to Team. If any are false, stay on Pro a little longer.

What Team gives you

- **Shared Projects** — your "About my business" project becomes everybody's "About our business."
- **Admin and SSO** — central billing, single sign-on if you use it, role-based permissions.
- **More usage per person** — higher limits than Pro per five-hour session.
- **Centralized data settings** — you control what your team can connect and share.

Team pricing is per seat per month. Check the current rate at claude.ai/pricing/team. It's more than Pro, less than hiring an extra person — by an order of magnitude.

Three rules for rolling out to your team

Skip these and your team rollout will look like every other doomed company tool deployment.

- 1 Name a champion.** One person who is the in-house expert. Not you. Someone who's enthusiastic and patient. They become the "ask Janet" person when anyone has a Claude question. This single move is the difference between adoption and abandonment.

- 2 Build one shared project before adding seats.** Don't add five people to a blank Claude account. Build the "About our business" project, fill it with the same docs from your personal Pro plan, then invite people in. Now the first chat anyone has is already useful.
- 3 Block 60 minutes for a team intro session.** Show them your three workflows. Let them try one. Answer questions. This is the highest-ROI hour you'll spend this quarter — bigger than any all-hands you'll run all year.

HOT TAKE

If you can't get three people on your team to use Claude weekly, the problem isn't Claude. It's that your three people don't have time to think. Fix that first.

THE FEARS, ADDRESSED.

The five things that stop SMB owners from pulling the trigger. The honest answers.

If you have all the same questions everyone else has, that's because they're the right questions. Here are the five you should be asking.

1. "What about my data?"

Plain English: by default, Anthropic does not train its AI models on your conversations or files. You can verify this in their privacy policy at anthropic.com/privacy. Team and Enterprise plans add extra controls — admin oversight, retention settings, more granular permissions.

What you should still keep out of any AI tool, including Claude:

- Account passwords and API keys (Claude will refuse anyway)
- Bank account or credit card numbers
- Social Security numbers or government IDs
- Anything you wouldn't email to a coworker

MEET LIN

Lin runs a small medical billing firm in Boise. She held off six months because of HIPAA worries — fair, given her industry. She did three things before signing up: read Anthropic's privacy policy line by line, asked her compliance consultant about her specific risk, and wrote a one-page internal policy ("no patient names in Claude, no diagnostic codes, no insurance IDs"). Now her team uses Claude for everything that doesn't touch protected health info — vendor emails, training materials, internal SOPs. Her one-page policy lives on a card on every desk.

2. "What if it makes stuff up?"

Yes, it can. AI tools sometimes generate confident answers that turn out to be wrong — especially with numbers, citations, and "according to..." claims.

This is solvable. Two-step pattern: **Claude drafts** → **you skim** → **Claude revises with corrections**. Build this into every important workflow. The goal isn't zero errors. The goal is errors caught before they leave your laptop.

MEET ANTOINE

Antoine is a property manager outside New Orleans with 23 rentals. He once had Claude draft a lease addendum and almost sent a tenant a clause that didn't apply to his state. He caught it on his second-pass read — five minutes of editing instead of a small legal headache. His rule now: anything legal, financial, or compliance-related gets a second pass with the question, "Are any of these specific claims actually verifiable?" Five-minute habit, prevents 99% of these.

3. "Will my employees use it for the wrong things?"

Maybe. The simplest internal policy that works fits on one card. Three rules:

- 1 No customer or employee personal data in any prompt without owner approval.
- 2 Anything Claude writes that goes to a customer gets human-edited first.
- 3 If you're unsure whether a use case is okay, ask before doing it — once.

That's the policy. Print it. Done.

4. "Am I going to replace my people?"

No. You're going to make the people you have faster and freer.

The math of small business is unforgiving: every hour an employee spends on grunt work is an hour they're not selling, building, or talking to customers. Claude eats the grunt work. Your team gets the higher-leverage work back. That's the entire pitch.

If you're hoping AI lets you fire half your team — wrong tool, wrong industry, wrong moment. The owners who win this round are the ones who use AI to make their team look like a team twice their size. Not the ones who shrink the team.

5. "What if Anthropic changes the rules or raises prices?"

Honest answer: pricing has held flat for years. Features have grown. But you should always be able to walk.

Two safety habits:

- Export your project files monthly. They live as documents you own — not as prompts you'd lose.
- Save your best prompts in a doc somewhere outside Claude. Same idea.

If Anthropic ever does something that makes you walk, you'll walk with everything you built.

HOT TAKE

Every fear in this chapter is reasonable. Every one of them is also smaller than the cost of doing nothing for another year.

WHERE TO GO FROM HERE.

A 5-item checklist. Three ways to keep learning. One last note from me.

You've been generous with your time. I'll be brief.

The 5-item starter checklist

Tear this out. Tape it to your monitor. Check them off in order.

- 1 Pro plan, paid for
- 2 Desktop app, installed
- 3 One Project built ("About my business")
- 4 One Cowork task running daily
- 5 One teammate shown

Five boxes. Most owners take a week. The fastest one I know took 47 minutes.

Three ways to keep learning

Not five. Three. Anything more is a waste of your time.

- 1 **Subscribe to the podcast.** Every Monday I cover what changed in AI for SMBs that week, plus a deep-dive on one tool or workflow. Search "The AI Operator with Shaun Gehring" wherever you listen.
- 2 **Bookmark Claude's help center** at support.claude.com. They update it when features change. You'll go there once or twice a month.
- 3 **Set a calendar reminder for 30 days from now** to revisit this guide. Same questions, new answers — because you'll have a month of real use under your belt and the things that look hard now won't.

A note from Shaun

This isn't magic. It's leverage.

The owners I talk to who win this decade aren't the ones with the most expensive tools or the biggest teams. They're the ones who notice a leverage point early, pull on it, and stay pulling. Claude is one of those leverage points right now. Two years from now everyone will be using something like it. The advantage is in the eighteen months between now and then.

If you take one thing from this guide, take this: pick three workflows, run them this week, and revisit the doc in a month. That's the whole game. The owners who do this look like geniuses in two years. Be one of them.

Catch you on Monday.

— **SHAUN**

QUICK REFERENCE CARD.

Five copy-paste prompts. The glossary. Where to find me.

The 5 prompts to start with

Save this page. These five prompts cover most of an SMB week.

TOP 5 PROMPTS

1 · INBOX TRIAGE (SCHEDULED, DAILY)

Every morning at 7am, scan my unread email from the last 24 hours. Group threads into THREE buckets: Needs me today, Can wait, Ignore. For bucket 1 only, give me a one-sentence summary per sender. Email me the ranked list.

2 · PROPOSAL FIRST DRAFT

New lead: [details]. Using my pricing sheet and the three sample proposals in this project, draft a 6-page proposal. Personalized intro, scope, timeline, pricing, clear next step. Match the voice of my best past proposal.

3 · SPREADSHEET SENSE-MAKING

Here's my [report]. Tell me: top 3 categories that grew the fastest, anything unusual or worth checking, and one chart I should look at. Output the chart as an image.

4 · REPLY IN MY VOICE

Here's an incoming email. Draft a reply in MY voice using the samples in this project. Match my tone, length, openings, and closings. Flag anything unclear at the top instead of guessing.

5 · A WEEK OF CONTENT

Core idea this week: [topic]. Using the brand voice in this project, produce: a 600-word newsletter, three LinkedIn posts (different angles), two Instagram captions, and one customer-story angle. All in my voice.

Glossary

PROJECT

A folder with a brain. Holds documents, instructions, and chats — Claude reads everything in a project before answering. One project per role you'd hire for.

COWORK

The desktop-only feature that lets Claude do multi-step work — read your inbox, run a Monday report, draft replies. Pro plan and above.

CONNECTOR

A plug-in that lets Claude read from another app: Gmail, Drive, Calendar, Slack, Notion, more. You approve every action.

ARTIFACT

A small interactive tool, dashboard, or document Claude builds inside a chat. No coding. Save, share, embed.

CONTEXT WINDOW

How much Claude can read in one go. Currently equivalent to about a 500-page book per project.

MCP (MODEL CONTEXT PROTOCOL)

The plumbing that lets Claude connect to outside tools. You don't need to know how it works. You just need to know it's why Claude can read your inbox.

HALLUCINATION

When Claude generates a confident-sounding answer that's wrong. Solvable with a "trust but verify" two-step.

ABOUT THE AUTHOR

Shaun Gehring hosts *The AI Operator*, a weekly podcast about how small and mid-sized businesses can use AI to compete one weight class up. He's a software developer, an SMB operator, and the guy your friend keeps quoting when they say "yeah but Shaun says you should just buy Pro."

Find the podcast at theaioperator.show or wherever you listen. New episode every Monday at 6am.