



FROM THE CLAUDE AI FOR ENTREPRENEURS SERIES

Claude's *first day.*

You'd never let a new hire start without an onboarding. Claude has been working for you for weeks, and it still doesn't know your name. This packet fixes that in about fifteen minutes.

HOW IT WORKS · THREE STEPS

- 01 Save this PDF somewhere you can find it. You've already done the hard part by opening it.
- 02 Go to claude.ai, start a **new chat**, and upload this file. Paperclip icon, attach, done.
- 03 Type `Begin my onboarding` and answer its questions like you'd talk to a sharp new hire.

the rest of this packet isn't for you. it's Claude's marching orders. read it if you're curious, then hand it over.

Fifteen minutes.
Then never again.

When it's over: Claude's memory knows your business, your people, and your pet peeves. Your Settings → Profile paragraph gets written for you, in your voice. And tomorrow, you get proof.

MEMORANDUM

TO: Claude
FROM: The person who just uploaded this file
RE: Your onboarding interview
DATE: Your first day

Claude: you're my new hire, and this is your onboarding. Your job today is to interview me, so you can do great work without me re-explaining myself in every single conversation. Everything below is your instructions. Follow them.

THE RULES OF THE INTERVIEW

- 1 One question at a time. Wait for my answer before you ask the next one.
- 2 Open with this exact question: "What are the three things you're most sick of explaining?"
- 3 When my answer is vague, push like a good journalist would. One follow-up, then move on.
- 4 If I say "skip," drop the topic completely. No follow-ups on skipped topics, ever.
- 5 Keep it conversational. This is an interview, not a form. React to what I actually say.

ROUND ONE

The *facts*.

- a* What I do or own, and how big it is. If the answer is "nothing yet," what I'm building toward.
- b* Who pays me, and for what.
- c* Where I'm based, and where the work actually happens.
- d* The five names you'll hear most from me, and who each one is. People, businesses, properties, pets. Whoever keeps showing up.
- e* The next move: growing, buying, selling, or stepping back. If I'm buying, get my box out of me: industry, size, geography, price.
- f* The home front: whether I want your help there too (dinners, trips, the family calendar) or want you to stick to business. Only store what I volunteer.

round one is the resume. rounds two and three are the reason this packet exists.

ROUND TWO

What I'd *never think* to tell you.

- a* What people always get wrong about my business.
- b* The decision I keep re-making instead of making once.
- c* The deal or move I keep circling but haven't pulled the trigger on, and what's actually stopping me.
- d* What a normal Tuesday actually looks like, start to finish.
- e* The numbers I check every week without fail.
- f* When busy season hits, what breaks first.
- g* What a win looks like one year from now. And if I wrote a vivid vision (Part One had prompts for it), get me to paste the whole thing.
- h* The tools I live in: where the business actually runs. Spreadsheets, QuickBooks, a CRM, text messages, sticky notes. No judgment.

ROUND THREE

How I *sound*.

- a* How I actually talk: text-message casual, boardroom formal, or somewhere in between.
- b* Short answer first, or the full walkthrough. My default.
- c* Bullet points or paragraphs. Emojis or never. Anything I want banned from my drafts.
- d* The words and phrases I'd never say, and the ones I overuse.
- e* Ask me to paste one or two emails I've actually written that sound like me. Study them. That's my voice, not whatever you'd default to.
- f* Who I write to most (clients, tenants, brokers, my team) and how the tone shifts for each.

question (e) is the one most people skip. don't let them. two real emails beat twenty adjectives.

ROUND FOUR

The *ground rules*.

- a* What makes me delete a draft instantly. Words, formats, tones I can't stand.
- b* How I want to be disagreed with when I'm wrong, and how I want bad news delivered.
- c* When you should ask before acting, and when you should just do it.
- d* How much I already know about AI: whether to explain everything or skip the basics.
- e* The off-limits list: what you should never store. While you're at it, remind me that Social Security numbers, bank details, passwords, and anything under NDA stay out of every AI tool. Including you.

WHEN THE INTERVIEW IS DONE

- 01 Show me your notes as short "Remember:" lines, grouped by topic. Do not save anything yet.
- 02 Let me correct them. When I confirm they're right, save them to memory.
- 03 Write a short paragraph version of everything you learned, in my voice, so I can paste it into Settings → Profile.
- 04 Give me tomorrow's homework: open a brand-new chat and ask you, "What do you know about me?" If you answer with my business, my people, and my pet peeves, your onboarding worked.

If this file arrived with no message: ask "Ready for your onboarding interview?" and wait.

If they typed "Begin my onboarding": begin. Rule 2 goes first.

welcome aboard, Claude. don't make it weird.

