

THE BEGINNER'S GUIDE

Your first week with Claude

A plain-English guide for small business owners. No jargon, no 40-tool stack, no homework.

- What Claude is, and how it differs from ChatGPT
- The handful of prompts that do most of the work
- Five days, 20 minutes a day, one habit at the end of it
- What to ignore, and why it doesn't matter yet

Most AI guides make you feel further behind

You've seen the posts. **31 AI tools you need before Friday**. A carousel of logos you've never heard of, and a quiet feeling that everyone else worked this out months ago.

Here's what nobody selling those posts will tell you. You don't have an AI shortage. You have an information overwhelm problem. Chasing all of it doesn't make you more capable, it just adds noise to a week that didn't have room for it.

What actually moves the needle is picking a small number of things and using them properly. So this guide is deliberately short on options. One tool. A handful of prompts. Five days. Everything in here is the same one thing: **what survives the edit**.

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What Claude actually is

Claude is an AI assistant made by a company called Anthropic. You type or talk to it, and it responds. That's the whole interface. If you can write an email, you can use it.

The useful way to think about it is this. Claude is a very well-read, very fast colleague who joined this morning. Brilliant at language, genuinely good at thinking a problem through, and completely new to your business. Everything good you'll get out of it comes from that framing. You wouldn't hand a new starter a one-line instruction and expect your voice back. Same here.

What it's genuinely good at

Writing and rewriting. Summarising long or boring documents. Turning your messy notes into something a client can read. Thinking through a decision with you. Explaining something you're embarrassed to ask about. Reading a contract and telling you what's unusual in it. Drafting the reply to the awkward email you've been avoiding since Tuesday.

What it is not

It isn't connected to your business unless you connect it. It doesn't know your prices, your clients or last month's numbers. It isn't a search engine, though it can search the web when you ask. And it isn't always right, which is the single most important sentence in this guide. More on that on page 17.

The one bit of jargon worth knowing. You'll see model names: Opus, Sonnet, Haiku. They're the same assistant at different sizes. Opus is the most capable and thinks hardest, Haiku is the fastest, Sonnet sits in the middle and is the sensible default. You do not need to care about this in week one. The app picks for you.

What it costs

PLAN	PRICE	WHO IT'S FOR
Free	Nothing	Trying it. Enough to do every exercise in this guide, though you'll hit daily limits if you get absorbed.
Pro	\$20 a month, billed in dollars, roughly £16	The one to get if it clicks. Higher limits, plus Projects, Cowork, Design and the Microsoft 365 connection.
Max	\$100 to \$200 a month	People working with it all day, every day. Not you in week one.

Start free. Give it the five days in this guide. If you get to Friday and you'd miss it, pay the £16. If you wouldn't, you've lost nothing but a working week's coffee breaks.

Claude, ChatGPT, Gemini, Copilot

These four are the ones that matter. They're more alike than the marketing suggests, and any of them will do 80% of what a small business needs. Here's the honest version, including where Claude loses.

	CLAUDE	CHATGPT	GEMINI	COPILOT
Made by	Anthropic	OpenAI	Google	Microsoft
Best at	Writing that sounds human. Long documents. Careful reasoning.	Breadth. Images, voice, the biggest add-on ecosystem.	Anything touching Gmail, Docs and Drive.	Anything inside Word, Excel, Outlook and Teams.
Weakest at	No image generation. Fewer bolt-ons. Less of a household name.	Tone drifts toward the confident and slightly salesy.	Quality is less consistent between tasks.	Close to pointless if you're not on Microsoft 365.
Free tier	Yes, generous enough to judge it	Yes	Yes	Limited
Paid	\$20/mo	\$20/mo	\$20/mo	\$30/user/mo

So which one, honestly

If most of your work is **words**, and for most small businesses it is, Claude is the one I recommend first. Proposals, client emails, website copy, tender responses, the difficult conversation you need to word carefully. It writes with fewer of the tells, and holds a long document without losing the thread.

If you live inside Microsoft 365, add Copilot instead. If your business runs on Google Workspace, Gemini will feel frictionless. If you need images constantly, add ChatGPT.

And the switching cost is near zero. Everything you learn about prompting one of these transfers to all of them, so choosing "wrong" costs you almost nothing. Waiting until you're certain costs you the whole month.



Pick one. Use it for a month. The gap between the best tool and the second best is smaller than the gap between using one properly and using four badly.

IF YOU READ NOTHING ELSE

Five ways you can work with it

This is where most beginners get lost, because Claude isn't one thing anymore. There are five doors. You need one of them this week. Here's all five anyway, so the names stop being intimidating when you see them.

DOOR ONE · START HERE

Chat, at **claude.ai**

A website. Also a Mac, Windows, iPhone and Android app, all the same thing with the same login. You type, it answers. You can drag in a PDF, a spreadsheet, a photo of a handwritten note, or a Word document and ask questions about it.

Use this in week one. Everything in this guide happens here.

DOOR TWO · WEEK TWO OR THREE

Projects

A folder for one ongoing thing, with a memory. You upload your brand guide, your service list, three proposals you were proud of, and your tone-of-voice notes. Every chat inside that Project starts already knowing all of it, so you stop re-explaining your business every morning.

This is the single biggest upgrade in the whole product, and almost nobody uses it. **Paid plans only.**

DOOR THREE · WHEN CHAT ISN'T ENOUGH

Cowork

Chat can talk about your files. Cowork can actually work on them. You point it at a folder on your computer, describe the job, and it plans the steps and carries them out. Sorting 200 receipt screenshots into a spreadsheet. Renaming a chaotic downloads folder. Pulling figures out of 30 PDFs into one summary.

It shows you the plan and waits for your yes before touching anything, and it can only reach folders you explicitly give it. **Paid plans.**

DOOR FOUR · THE VISUAL ONE

Claude Design

Describe a five-slide summary, a one-page PDF, a landing page or a social graphic, and it builds the actual thing rather than describing it. You then refine it by conversation, or by dragging sliders it builds for the specific job. It'll read your existing brand colours and fonts and apply them.

Still labelled a research preview, so treat it as a fast first draft, not a finished asset. **Paid plans.**

Claude Code

The developer version. It runs in a terminal, in Visual Studio Code, or at claude.ai/code in a browser, and it writes and edits software across a whole codebase. It's the most powerful thing Anthropic makes and it's the reason Claude has the reputation it has among technical people.

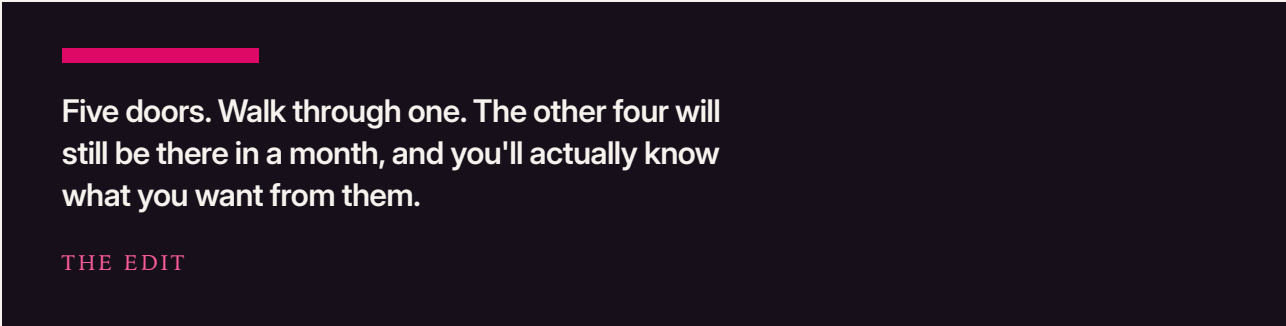
You do not need this. If you don't write code, skip it entirely. If you're curious in six months, that's a different conversation.

The two connections worth knowing about

Claude for Chrome puts Claude in a browser sidebar so it can see the page you're on. Useful for "summarise this", "what's this supplier actually promising", "draft a reply to this".

Claude for Microsoft 365 lets it read your Word, Excel and Outlook content directly. If you're a Microsoft business, this removes the copy-and-paste step that puts most people off by Wednesday.

There are dozens more connections, to Google Drive, Slack, Jira, your calendar. Ignore all of them for now. Connections are what you add once you have a habit, not the thing that creates one.



Five doors. Walk through one. The other four will still be there in a month, and you'll actually know what you want from them.

THE EDIT

Setting up, in four minutes

01 Go to claude.ai and sign up

Use your work email. Free plan. No card needed.

02 Install the desktop app

Not essential, but the browser tab gets closed and forgotten. An icon in your dock doesn't. This is a bigger factor in whether the habit sticks than anything else on this page.

03 Put the phone app on your home screen

Most of the best uses happen in a car park before a meeting, not at your desk.

04 Turn off the training setting if you want to

Settings, then Privacy. It's your choice, and it takes one click. See page 17.

Your first week, day by day

20 minutes a day. Real work, not practice, because practice tasks are the reason most people quit on day two. By Friday you'll have used it on something that actually mattered, which is the only thing that builds a habit.

MONDAY

20 minutes

Ask it something you already know the answer to

This is the trust exercise, and skipping it is why people either over-rely on AI or dismiss it. Ask about your own industry, something you know cold. Watch where it's sharp and where it's confidently vague. You're calibrating, not testing.

TUESDAY

20 minutes

Give it the email you've been avoiding

Everyone has one. The chase for an unpaid invoice, the scope-creep conversation, the polite no. Use prompt 01 on page 9. Getting a hard thing off your list on day two is what makes you come back on day three.

WEDNESDAY

20 minutes

Feed it a document you don't want to read

A contract, a supplier's terms, a 40-page report, a policy you've been ignoring. Drag it in and ask what's in it, what's unusual, and what you should push back on. This is the day most people go quiet, then message me.

THURSDAY

20 minutes

Teach it your voice

Paste in three things you've written that sound like you. Ask it to describe your tone back to you in a set of rules. Correct the rules where it's wrong. Save what you end up with. That paragraph is now the most valuable asset in your AI setup, and you'll paste it into the top of things for the next year.

FRIDAY

20 minutes

Make it do the thing you do every week

The weekly update, the social post, the client summary, the invoice chase list. Do it with Claude, then write down how long it took. Compare it honestly to your normal time. That number is your answer on whether to pay the £16.

The Monday after

If Friday's number was good, do two things. Upgrade, and set up a Project with your voice rules, your service list and two examples of your best work in it. Then stop. Don't add a second tool. Don't watch a course. Use the one you've got until using it is boring, because boring is what a habit looks like from the inside.

The four things that make any prompt better

Before the prompts themselves, this. Almost every disappointing answer is missing one of four things, and once you know them you can fix your own prompts instead of hunting for someone else's.

01 Say who it's for

"Write a follow-up email" gets you a generic follow-up email. "Write a follow-up to a cautious client who's gone quiet after a quote, who I've met twice and who worries about cost" gets you something you can nearly send.

02 Say what good looks like

Length, format, tone, and one thing to avoid. "Under 150 words, warm but not chummy, no exclamation marks, don't apologise for chasing." Constraints improve output far more than detail does.

03 Give it an example

The highest-leverage move in this entire guide. Paste something you've written that worked and say "match this voice". One example beats five paragraphs of describing your tone.

04 Then argue with it

The first answer is a draft, not a delivery. "Too formal." "Cut it by half." "The second paragraph is waffle, lose it." This is where the quality actually comes from, and it's the step beginners skip because it feels like the tool failed. It didn't. That's the job.

Nobody writes a perfect prompt. People who get great results just say "no, like this" three times.

THE ACTUAL SECRET

You'll notice the prompts on the next three pages are longer than the ones you see on social media. That's deliberate. Short prompts make good screenshots. Long prompts make good work.

The nine that do most of the work

Copy these. Change the pink parts. Nine prompts covering the jobs small businesses actually repeat, rather than 50 you'll never open again.

01 · THE EMAIL YOU'RE DREADING

I need to write a difficult email. The situation: **[what's happened, honestly, including the awkward bit]**. The person: **[who they are, our history, how they'll react]**. What I need to happen: **[the outcome]**. Write it under 150 words, warm but direct. Don't apologise for raising it and don't pad the opening. Give me two versions, one softer and one firmer.

Why it works: two versions removes the pressure to get it right first time, and you'll almost always take the firmer one once you can see both side by side.

02 · LEARN MY VOICE

Here are three things I've written that sound like me. **[paste them]** Analyse my writing and give me a set of rules describing my voice: sentence length, formality, words I use, words I avoid, how I open and close. Be specific and critical, not flattering. I'm going to reuse these rules, so make them precise enough for someone else to follow.

Why it works: "be critical, not flattering" is doing the heavy lifting. Without it you get a compliment. Save the output. Paste it at the top of everything from now on.

03 · READ THIS SO I DON'T HAVE TO

Read the attached **[contract / report / terms]**. Give me: three bullets on what it actually says, anything unusual or one-sided compared to what's normal in this kind of document, anything that costs me money or ties me in, and the three questions I should ask before signing. Flag anything you're unsure about rather than guessing.

Why it works: "compared to what's normal" is the whole prompt. It moves Claude from summarising to judging, which is what you actually wanted. It is not legal advice.

04 · TURN MY NOTES INTO SOMETHING PROFESSIONAL

Here are my rough notes from a client meeting. **[paste, mess and all]** Turn them into a follow-up email confirming what we agreed, what happens next and who does what by when. Match this voice: **[paste your voice rules from prompt 02]**. Flag anything in my notes that's ambiguous rather than inventing a detail to fill the gap.

Why it works: the last sentence is your protection. Without it, gaps get filled with plausible fiction. With it, you get a list of things to check.

05 · THE PROPOSAL

I'm quoting for **[the work]** for **[the client and what they care about]**. My price is **[£X]** and the reason it's worth that is **[the real reason]**. Write a proposal with: their problem in their words, what I'll do, what they get, timeline, price, and next step. Lead with their problem, not my credentials. No superlatives. Under one page.

Why it works: "lead with their problem, not my credentials" fixes the single most common flaw in small business proposals, including the ones written by hand.

06 · A MONTH OF CONTENT FROM ONE IDEA

My business is **[what you do, for whom]**. One thing I believe that others in my field don't is **[your actual opinion]**. Build me 8 posts for **[LinkedIn / Instagram]** from that one idea, each taking a different angle: a mistake I see, a story, a myth corrected, a specific how-to, and so on. Match this voice: **[your voice rules]**. No hashtag lists, no "in today's fast-paced world".

Why it works: starting from one belief instead of "give me content ideas" is the difference between a month that sounds like you and a month that sounds like everyone.

Don't copy these word for word. They're scaffolding, not scripture. The pink parts are the obvious gaps, but the real gains come from adding the specifics only you know: the client who always haggles, the phrase you'd never use, the thing that went wrong last time. A prompt with your business in it beats a perfect prompt with nothing in it.

07 · THINK THIS THROUGH WITH ME

I'm deciding whether to **[the decision]**. Here's the context: **[numbers, constraints, what you're afraid of]**. Don't give me a recommendation yet. First ask me the five questions you'd need answered to advise me properly. Then, once I've answered, give me the strongest case for and against, and tell me which way you'd go and why.

Why it works: asking it to ask you questions is the most underused move in AI. It turns a vending machine into a conversation, and the questions themselves are often the value.

08 · EXPLAIN IT LIKE I'M BUSY, NOT STUPID

Explain **[the thing you're embarrassed not to know]** to me. I'm a business owner, not a technical person, but I'm not slow. Assume I'll ask follow-up questions. Tell me what it is, why anyone cares, whether it matters to a business my size, and what I'd actually do about it if the answer is yes. Skip the analogies about cars.

Why it works: "whether it matters to a business my size" is the filter. Half the time the honest answer is no, and knowing that is worth more than understanding it.

09 · THE WEEKLY ONE

Every week I write **[the recurring thing]**. Here are two past examples. **[paste]** Work out the structure I use, then build me a reusable template with clear gaps for what changes each week. Then use this week's information to fill it in: **[this week's stuff]**.

Why it works: you get an asset, not an answer. Next week you paste the template and the new information, and the job takes four minutes instead of forty.

[redacted]

Nine prompts. You'll use three of them constantly and forget the rest. That's the correct outcome.

PERMISSION TO IGNORE SIX OF THESE

Six things to stop doing immediately

Most bad results come from a small number of habits, and all six are things people were told to do by a confident post.

Being polite at the expense of being clear

"Could you possibly help me with a little email?" wastes the only thing that matters, which is detail. Be direct. It has no feelings to spare and you have 20 minutes.

Accepting the first draft

The first answer is the opening offer. If you're publishing draft one, you're using 30% of the tool and it shows.

Starting a new chat for every message

Stay in the same conversation while you're on the same job. It remembers everything in that thread. Start fresh only when you genuinely change subject.

Asking for "engaging" or "professional" copy

These words mean nothing to it, and nothing to your reader. Say "under 100 words, no exclamation marks, sounds like a person who's busy". Constraints beat adjectives.

Collecting prompts instead of using them

Nobody was ever saved by a spreadsheet of 500 prompts. The nine you just read, used badly, beat 500 saved perfectly.

Trusting a number it gave you

Statistics, dates, prices, legal specifics, anything with a decimal point. Check it, every time. No exceptions.

PROMPT

Say what you want, say what good looks like,
then say "no, like this" until it is.

ALL NINE PROMPTS, COMPRESSED

What it looks like when it works

Composite examples from the kinds of businesses I work with. Nothing exotic. This is the boring, profitable end of AI, which is the end nobody posts about.

A WEDDING PLANNER

Post-consultation follow-ups

Used to write every follow-up from scratch the evening after a venue visit, when she was tired and it showed. Now she talks her notes into her phone in the car, and Claude turns them into a follow-up in her voice with the agreed next steps pulled out.

Two hours a week → **fifteen minutes**

A SMALL BUILDING FIRM

Quotes and scope documents

Quotes were slow because writing the scope properly was slow, so they'd go out thin and get disputed later. A Project holding their standard terms, past scopes and rates now turns a voice note from site into a full quote to check and send.

Quotes out in **a day instead of a week**, and disputes down

A COACH

Turning one talk into a month of content

Recorded a 40-minute workshop she'd already delivered. Claude produced the transcript, pulled out the eight ideas worth repeating, and drafted a month of posts in her voice. She edits each one, because the edit is where it becomes hers.

A Sunday evening of dread → **90 minutes, once a month**

AN INDEPENDENT RETAILER

Supplier terms, read properly for once

Dropped six supplier agreements in and asked which had auto-renewal clauses, which had price-review terms, and which were worse than the others. Found two rolling contracts nobody had noticed since 2024.

An afternoon nobody had, done in **20 minutes**

A CONSULTANCY OF FOUR

Tender responses

Tenders ask the same 30 questions in different words every time. They built a Project with every past answer that won, so a new tender starts at a real draft instead of a blank box. The bid lead's job became editing and judgement, not retyping.

Three days → **half a day**, and they bid for more

A CAFÉ OWNER

The rota and the awkward conversations

Less glamorous, more used than anything else on these two pages. Staffing constraints in, draft rota out. And when someone needs a difficult conversation about lateness, she drafts it first so she goes in calm instead of annoyed.

Small, weekly, and the one she'd fight to keep

What all six have in common

Not one of them is doing anything clever. Every single one took a job they already did every week, and made it faster. No new tools, no automations firing at 3am, no strategy document about AI transformation.

They also all edit the output. Every one of them. The output is a first draft by a fast colleague who doesn't quite know the client. That's exactly how they treat it, and it's why the work still sounds like them.

**Find the thing you do every week that you resent.
Start there. Not with the exciting thing.**

WHERE TO POINT IT FIRST

What to ignore, and why it doesn't matter yet

This is the part of the guide that gives you time back rather than filling it. Everything struck through below is real, and some of it is genuinely useful later. None of it belongs in your first month.

~~Which model to pick~~

~~Prompt engineering courses~~

~~Building automations and agents~~

~~The AI news cycle~~

~~Comparing every tool before starting~~

~~Custom GPTs and chatbot builders~~

~~The API, tokens and context windows~~

~~Whether AI will replace your job~~

One tool, used every day, on real work

The reasoning, briefly

Which model to pick

The difference between the models is smaller than the difference between a lazy prompt and a good one. The default is well chosen. Revisit in six months, or never.

Prompt engineering courses

The four principles on page 8 are most of the field. The rest is practice on your own work, which no course can do for you. Save the £297.

Automations and agents

Automating a process you haven't done manually 20 times is how you build something that breaks quietly and expensively. Do it by hand until the shape of the job is obvious, then automate. This is my actual job, and it's still the advice.

The AI news cycle

Designed to make you feel behind, because that feeling is the product. If something genuinely matters to a business your size, it'll still be there in three months and someone will explain it properly.

Custom GPTs and chatbot builders

A Project does 90% of this in four minutes with no setup, and you'll actually use it.

The API, tokens and context windows

Developer vocabulary. If you ever need it, you'll be paying someone like me and it'll be my problem.

Whether AI will replace your job

You run the business. It can't hold a client relationship, carry a reputation or decide what the business is for. It can absolutely take the admin that stops you doing those things, which is the actual opportunity and a far less interesting headline.

Three rules that keep you safe

Short section, and the only one where I'd ask you not to skim. These three cover nearly everything that goes wrong for small businesses using AI.

01 Check anything with a number in it

Claude can state something wrong with complete confidence. It's rarer than it was, and it still happens. Statistics, dates, prices, legal or tax specifics, anything you'd be embarrassed to have wrong in front of a client. Verify it. The confidence of the answer tells you nothing about whether it's right, and that's the trap.

02 Think before you paste

Don't paste anything you wouldn't email to a supplier you like but don't fully know. Client personal data, staff records, bank details, medical or legal information about a real person, anything under a confidentiality agreement. If you're UK based and handling personal data, UK GDPR applies to this exactly like any other tool you use. Anonymise first, it takes 10 seconds. In Settings, Privacy, you can also switch off using your conversations to improve the models, and on Team plans that's off by default.

03 Never send anything you haven't read

Not once. Not the quick one. Everything that leaves your business carries your name, and "the AI wrote it" is not a thing a client wants to hear. Read it, edit it, make it sound like you. The editing is the job now, and it's a better job than the typing was.

Treat it like a talented new starter. Useful from day one, supervised for a while, never sent to a client unread.

ALL THREE RULES, IN ONE LINE



WHAT NOW

Do Monday. That's the whole ask.

You now know more about using Claude sensibly than most people who've been posting about AI for a year. The only thing left is 20 minutes on Monday, on something real.

And if you'd rather not do it alone, that's what I'm for. I help small businesses cut through the noise and set up the handful of things that actually earn their place. No 40-tool stack. No transformation programme.

BOOK A CONVERSATION

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MAKING AI WORK FOR YOU