



The setup nobody does, and the reason your answers keep coming back flat. About 20 minutes, start to finish.

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READ THIS FIRST

Been Using Claude for a Year? Read This Anyway.

Quick question before you skip ahead.

Have you turned off the setting that lets your conversations train their AI? Do you know where your memory lives, or what Claude has written down about you? Have you ever opened Instructions for Claude?

If you have been using Claude for months and the answer is no, that is not a beginner problem. That is the setup nobody does, and it is the reason your answers still come back flat.

START HERE

Why Claude Felt Disappointing

You opened Claude. You typed a question. It gave you something generic and flat. And you thought, what is all the hype about?

That was not Claude doing its best. That was Claude with zero context about who you are. Out of the box, Claude does not know your name, your work, your goals, or how you like to communicate. It is basically talking to a stranger.

This guide changes that. Follow the steps in order and you will have Claude set up the way it was meant to be used, in about 20 minutes.

How to Use This Guide

Open Claude in your browser or on your desktop app as you read this. Then follow each step in real time. [Watch the video](#) if you need help.



WATCH THE WALKTHROUGH → [YOUTU.BE/LOM1J40076U](https://youtu.be/LOM1J40076U)

A few things to know before you start:

The look of Claude may change over time. Buttons move. New features appear. Settings get renamed. But if you know what each thing does, you will always find your way around, so I have told you what you are looking for as well as where it currently sits.

Almost every setting in this guide lives in one place. Click your name in the bottom-left corner, then Settings. That opens a panel with two lists: Settings down the top half, Customize down the bottom. Get used to that panel and the rest of this is quick.

The free plan does more than it used to. It now includes memory, web search, file uploads, and connectors. The \$20 Pro plan gives you five times more usage, and it adds Cowork, which is the part of this guide that does actual work while you are not there. If you want to use Claude regularly I suggest you pay for it.

Claude is available in your browser, as a desktop app, and on your phone.



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STEP 01

Create Your Account

You have probably done this already. Two minutes if you have not.

Go to claude.ai in your browser. Click Sign Up. You can continue with Google or use an email address. Either works fine.

Follow the onboarding steps. Claude will ask for your phone number and send a verification code.

When asked about your plan, choose the Pro plan at \$20 per month. It is \$17 per month if you pay for the year up front. The free plan works but you will hit limits quickly, and Cowork is not included.

Optional: download the desktop app if you prefer working outside your browser. It looks slightly different but works the same way.

STEP 02

Find Your Way Around

Also probably familiar. Skim it.

The big text box in the middle is where you type your questions. Along the bottom of that text box is a dropdown to choose your model, more on that in a moment.

On the left side is a panel showing all your old chats. There is a plus button to start a new one. If the sidebar feels cluttered, click the arrow to collapse it and bring it back when you need it.

Also on the left you will see Projects, Artifacts, Scheduled, and Customize. These are important and we will cover each one.

In the bottom corner is your profile and settings.

Right now, out of the box, Claude does not know anything about you. It is like starting a conversation with a complete stranger every single time. That changes once you do the next few steps.

STEP 03

Turn Off the Data Training Setting

Do this before you type anything into Claude.

Click your name in the bottom-left corner, then Settings, then **Privacy**. Scroll to Preferences.

Find the setting that says **Help improve our AI models**. Turn it off.

While you are there, there is a second toggle called Location metadata. That one lets Claude use your city or region. Your call, it is not a training setting.

When this setting is on, every conversation you have is used to train their AI. That means everything you type goes into their data. Turn it off so your conversations stay private.

There is a second reason to care. Leave it on and they keep your data for five years. Turn it off and it drops to 30 days.

You can do this on the free plan too. It is not a paid feature.

NOTE

If their safety systems flag a conversation, it can still be reviewed regardless of this setting.

Understand the Models

At the bottom of the chat box there is a dropdown. This is where you choose which version of Claude you are using. You do not need to memorize the names. Just know what each one is best for.

Sonnet is the everyday model. Fast and capable, and it handles most of what you will throw at it. Drafting, summarizing, questions, working an idea back and forth. It is the one Claude starts you on.

Opus is the heavyweight. Deep reasoning, legal language, a 90-page report, a decision with a lot of moving parts. It takes longer and uses more of your usage, but the difference shows.

Haiku is for speed. Quick answers, fast summaries, simple lookups. It trades some depth for a faster response.

Fable sits above Opus, for work where only the best output will do. As of this guide it is not part of the subscription. It runs on separate usage credits you buy on top, so it is not one you will be reaching for day to day. Worth knowing it is there.

Below those there is a More models option holding the previous versions. Ignore it unless you have a specific reason to go back to one.

Read those descriptions and pick whichever fits what you are about to do. Nobody sticks with one. Most days look like Sonnet for the ordinary work, Opus when the thinking gets heavy, then back to Sonnet. Switching is one click and it only changes the conversation you are in, so there is nothing to undo later.

Effort and Thinking

Next to the model name is a second setting called Effort.

Effort has five levels: Low, Medium, High, Extra and Max. Medium is the default. Turning it up means Claude works the problem harder and gives you a more thorough answer. It also takes longer and burns through your limits faster, which is exactly the trade you would expect.

In the same menu is a Thinking toggle. With it on, Claude reasons through the problem before it answers instead of starting to type immediately.

When to use it: complex problems with a lot of moving parts. For example, navigating a house sale, contracts, pricing, timing, negotiating with buyers. Turning thinking on means Claude reasons through all of it before responding.

For everyday tasks, leave Effort on Medium and stop thinking about it. Turn it up when the answer matters and you would rather wait.

Turn On Memory

Without memory, Claude forgets everything the moment you close a chat. Every new conversation is a blank slate. If you find yourself re-explaining the same things over and over, your name, your work, your preferences, memory is what fixes that.

Go to the bottom-left corner of the screen. Click your name. Click Settings. Click Capabilities. Memory sits at the top. You will see two options. Turn both on.

Here is what each one does:

Search and reference chats lets Claude search through your old conversations. When you ask something, it can pull up relevant details from past chats and link back to the original conversation. Turn this on if you want to find things you discussed weeks ago.

Generate memory from chat history builds a picture of your preferences, interests, work style, and patterns, and applies it to every future chat. This one covers both your chats and your projects.

If that second one has a small Legacy tag next to it, that is fine. Anthropic is partway through replacing the older memory system and the tag just means your account is still on the previous one. Turn it on either way.

Memory is not a summary that rebuilds itself overnight. Claude writes individual notes as you talk, sorted into categories, and updates them mid conversation. Tell it something now and it is there now.

If privacy is a concern: in that same Capabilities panel there is a row called **View and manage memory**. Click it. You will see everything Claude has stored, grouped by category. Open one to read it. There is a box to tell Claude what to change or remove, and you can delete individual memories at any time.

There is also an option to import your memory from another AI provider, if you have been using something else and do not want to start from nothing.

TWO THINGS PEOPLE GET CAUGHT BY

Projects keep their own separate memory. What Claude learns inside a project stays inside that project.

Incognito chats are never saved to memory, on any plan.

Write Your Instructions for Claude

Most people skip this. That is why they keep getting generic answers.

Your instructions tell Claude who you are, what you care about, how you want your answers, and what to never do. Fill this out once and every conversation starts from that baseline. You stop repeating yourself and Claude stops sounding like it is talking to a stranger.

Click your name in the bottom-left corner. Click Settings, then **General**. Scroll past your name and avatar and you will find a box labelled **Instructions for Claude**.

(This used to be called Custom Instructions. Same thing, new name.)

Underneath the box it tells you these apply across both chats and Cowork, which is worth noting. Whatever you write here follows you everywhere.

Fill it in using four simple areas: who you are, what you care about, how you want your answers, and what Claude should never do.

The real power is in those last two. How you want your answers and what to never do. For example: give me short answers unless I ask for more. Never use bullet points for simple questions. Do not give me disclaimers. Just answer the question.

COPY-PASTE PROMPT: YOUR FIRST INSTRUCTIONS

Here is who I am: [your name], [your job or main focus], based in [your city or region].

I care about: [two or three things that matter to you, family, your business, staying healthy, whatever fits].

How I want my answers: Keep things short and plain. No jargon. If I want more detail I will ask. Give me a clear answer first, then explain if needed.

Never do this: Do not give me long disclaimers. Do not use technical language. Do not assume I want a list, sometimes I just want a straight answer.

Set Up a Project

Projects are folders. Each one is a dedicated workspace for a specific area of your life or work, a client, a personal goal, your business operations, your health. Claude keeps everything inside that project separate from everything else.

Each project has its own custom instructions, its own files, and its own memory. That means the context from one area of your life does not bleed into another.

Look at the left side panel and click Projects. Click New Project.

Give it a name. For example: Sweet Life Bakery Website or My Health Research.

Add project-specific instructions. What is this project about? What tone do you want? Who is the audience?

Upload any relevant files, a client brief, a document, a spreadsheet. Claude will read everything in the folder.

Once a project is set up, you stop spelling out all the details every single time. Claude already knows the context. Your prompts get shorter. The output gets more useful.

Free accounts get five projects. Paid plans are unlimited.

COPY-PASTE PROMPT: SET UP YOUR FIRST PROJECT

I am setting up a new project and I want you to remember the following context for every conversation inside it.

Project name: [name it]

What this is for: [describe what you are working on]

Tone and style I want: [casual, professional, friendly, direct, your choice]

The audience for any content: [who will see or read it]

Things to always keep in mind: [any details Claude should know, your business name, your location, your goals]

Confirm you have understood this and are ready to help.

Voice Mode and File Uploads

Voice Mode

You do not have to type everything. Claude has a voice mode. Click the microphone icon and start talking.

This is useful when you are thinking something through out loud, or when typing feels like it is slowing you down. A lot of people find they get better results with voice because they explain things more naturally and with more detail.

If you are not sure where to start, just say: I am trying to figure out how to use you. Can you help me? Claude will guide you from there.

If you do not like the voice that answers, it is adjustable. Settings, then General, then scroll to Voice. You can change the language, the voice itself, and how fast it talks.

File Uploads

Look for the small plus button next to the chat box. Click it and you will see an option to add files or photos.

You can drop in spreadsheets, images, Word documents, and PDFs. Claude reads them, analyzes them, and answers questions about them. You do not need to copy and paste text out of a document. Just upload the file and ask your question.

- Summarize this for me and give me the three main points.
- I have two contracts here. Tell me what is different between them.
- What does this spreadsheet tell me about my sales last month?

You can upload multiple files at once. Do not retype what is already in a document. Upload it and move on.

The Plus Button, Research and Incognito

Next to the chat box is a small plus. It holds most of the things Claude can reach for, and the list changes depending on whether you are in Chat or in Cowork.

In **Chat** you get Add files or photos, Add to project, Skills, Connectors, Plugins, Research, and Web search. Web search has a tick beside it because it is already switched on.

In **Cowork** the list is shorter. Add files or photos, Skills, Connectors and Plugins.

Skills, Connectors and Plugins each open a submenu, so you can reach any of them in the middle of a conversation without going into Settings. Worth knowing once you have a few built.

Research Mode

Research sits in the Chat plus menu. Use it when you want a thorough investigation, not just a quick web search. Claude will ask you some clarifying questions before it starts and then dig deep. Only use this when you genuinely need comprehensive research. It takes more time and uses more of your usage.

Incognito Mode

Look for the small incognito icon in the top right corner of the screen. Hover over it and it says Use incognito. Click it to open a conversation where Claude has zero context about you, no memory, no custom instructions, nothing.

It is useful for testing how something looks without your personalization affecting it, or for working on something you do not want saved in your history. When you close it, the conversation disappears.

Understand Artifacts

When you ask Claude to create a document, a form, a chart, or a report, it does not just drop text into the chat. It builds the thing in a separate panel on the right side of your screen. That is what Claude calls an artifact.

Think of it as the actual finished thing, not a description of the thing, but the thing itself.

Documents and reports: you can read them and download them.

Forms and calculators: you can actually fill them out and test them right there.

Interactive tools and games: you can use them in the panel.

How to Edit an Artifact

You do not click on the artifact and try to edit it directly. You talk to Claude in the chat and Claude updates it for you.

Tell Claude what to change. Claude updates the artifact. The panel refreshes with the new version. That is how editing works for all artifacts, documents, forms, charts, everything.

When you are happy with it, download it and use it.

Where They Live

Click Artifacts in the left sidebar. Everything you have ever created is in there.

Live Artifacts in Cowork

Cowork has its own version of this. Anything Claude builds you during a Cowork session, a tracker, a dashboard, a comparison tool, saves itself to a Live artifacts tab in the Cowork sidebar. Live artifacts are desktop app only at the moment.

Connect Your Tools

This is where Claude goes from giving you advice to actually doing things.

Connectors let Claude talk directly to tools you already use, Google Calendar, Gmail, Google Drive, Canva, Microsoft 365, and others. Once connected, Claude can read from those tools and take actions in them.

Where to Find Connectors

Look at the left sidebar and click Customize. Click Connectors. Browse the list and click on any tool you want to connect. Follow the prompts to sign in and grant access.

Read vs. Write Permissions

When you connect a tool, Claude will tell you exactly what it can access. There are two types of access:

Read-only means Claude can look at your data but cannot change anything. This is safe to allow automatically.

Write access means Claude can create, edit, or delete things. For anything like this, creating a calendar event, deleting a file, set it to require your approval first. Claude will ask you before making any change.

What This Looks Like in Real Life

In the video, I connect my Google Calendar and then ask Claude: What is on my calendar tomorrow? Claude connects to the calendar and reads back exactly what is there.

I then ask Claude to rename a meeting. Claude asks for approval before making the change. I click Allow. Then open my calendar and the event has been renamed. Claude did not just tell me how to do it. Claude did it.

Teach Claude a Skill

A skill is a process you teach Claude once, and then it uses that process automatically every time the situation comes up.

Think about the things you do over and over. Writing a certain type of message. Creating a weekly update. Summarizing something in a specific format. Right now you probably re-explain that format every time. A skill fixes that.

Where to Find Skills

Click your name, then Settings. Look at the bottom half of that panel, under **Customize**. Click **Skills**.

You will see a list of your skills with who wrote each one. Some are already there, written by Anthropic. Two buttons sit at the top: Browse, to see what else is available, and Add, to make your own.

Start by looking at what Anthropic has already put in there and watching what those do. That will teach you more in five minutes than reading about them.

When you are ready to build your own, you do not have to write it from scratch. There is a skill called **skill-creator** that interviews you about your process and writes the skill for you. Open a chat and tell it what you want.

A Real Example: Facebook Post Skill

Let's say you write Facebook posts for a local bakery every week. They always follow the same structure: a hook, a main point, and a call to action. You could teach Claude that structure as a skill.

Once the skill is saved, every time you type /facebookpost, Claude knows exactly what format to follow. You do not remind it. You do not re-explain the structure. It just works.

Skills work across all your projects. Something you build in one place is available everywhere. They are on the free plan too.

 COPY-PASTE PROMPT: BUILD YOUR FIRST SKILL

I want to create a skill for something I do regularly. Here is the process I follow:

Task: [describe the task, for example, writing a weekly email update]

Format I always use: [describe the structure, for example, a one-line summary, three bullet points, and a closing question]

Tone: [how it should sound, friendly, professional, direct]

Things to always include: [anything that should never be left out]

Things to never do: [anything that would make this wrong for your needs]

Please help me turn this into a skill I can save and use going forward.

Cowork

Everything up to here happens in a chat. You ask, Claude answers.

Cowork is different. You hand it a job and walk away.

Claude's own description of it is give Claude a task to run autonomously, which is about as plain as it gets.

Look at the bottom of the chat box. There are two small buttons side by side: Chat and Cowork. That is the whole switch. Click Cowork and describe the job instead of asking the question.

It works on files, uses your connected tools, and comes back with something finished. A report, a briefing, a set of documents. It is on Pro and above, and it runs on desktop, web, and your phone.

Chat is a conversation. Cowork is delegation. You are not asking a question, you are giving somebody a task and coming back to the result.

Start with something you would happily hand to an assistant. Pull the numbers out of these twelve invoices and put them in a spreadsheet. Read these five documents and tell me what they disagree about.

One Setting Worth Knowing

Cowork has its own instructions, separate from the ones you wrote in Step 6.

Go to Settings, then Cowork. At the bottom is **Global instructions**, with an Edit button. Anything you put there applies to every Cowork session you ever run.

Use it for the rules that only matter when Claude is working unsupervised. Where to save things. What format you want files in. What it should never touch. Your Step 6 instructions already cover who you are, so do not repeat yourself here.

Scheduled Tasks

This is the one that changes how you work.

You can save a task and put it on a schedule. Describe it once. It runs on its own, at the cadence you pick, and delivers the finished thing.

Click **Scheduled** in the left sidebar. It sits just under Artifacts. Then click New task in the top right.

You do not have to invent one. Underneath is a set of ready-made tasks you can start from, and two of them are worth your attention:

Content ideas drafts a few post ideas each week from the latest news in your industry. Set to Monday mornings by default.

Monitor a topic watches for news or mentions of a topic, a competitor, or a keyword, and reports back daily.

The others cover a daily briefing, inbox triage, meeting prep and a Friday summary of the week. Pick one, change the wording to match your actual work, and set the time.

It runs in the cloud. Your laptop can be shut. You wake up and the work is done.

A Monday morning summary of what came in over the weekend. A monthly report pulled from the same three sources. A weekly check on something you keep forgetting to check.

Before You Let It Run Unattended

This part matters the moment a task runs while you are asleep.

Tell it what to do when something goes wrong. If the file is not there, stop and tell me. Do not guess.

Tell it what not to touch. Read the calendar. Do not create or delete anything.

Tell it what a boring answer looks like. If nothing changed, say nothing changed. Without that line, a task with nothing to report will find something to report.

Three sentences. They are the difference between a task you trust and one you have to check every morning, which rather defeats the point.

How the Pieces Fit Together

You now have four places to put information, and this is where people go wrong. They put the right thing in the wrong slot and wonder why Claude keeps ignoring it.

Instructions for Claude is always true and applies to everything. You are a business owner who wants short answers and hates jargon. That is never going to stop being true, so it goes here.

A Project is one job you are working on this month. The client, the brief, the files, the audience. True for this job, irrelevant to the rest of your life.

Memory is what a helper notices about you over time. You do not write it. Claude does, as you go. Your job is to check it occasionally and correct it when it gets something wrong.

A Skill is not who you are and not what you are working on. It is a set of steps to follow when a particular task comes up.

TWO MISTAKES CAUSE MOST OF THE TROUBLE

Putting a process into Instructions for Claude. Now your Facebook post format is firing in every conversation you have, including the one about your taxes. Processes go in skills.

Putting who you are into a project. Now you are writing it again for the next project, and the one after. Who you are goes in your instructions, once.

There is a fifth slot if you use Cowork: **Global instructions**, in Settings under Cowork. That one is for how you want unsupervised work done. Where files go, what format you want, what not to touch. It only applies when Claude is working on its own, so it stays out of the way the rest of the time.

Get those slots right and the flat generic answers mostly stop. That is the whole setup. Everything else is a preference.

The 3 Mistakes Most People Make

Once your setup is done, these three things will make the biggest difference in the results you get.

Mistake 1. Treating Claude like a search engine

Claude is not Google. You do not type in a few keywords and hope for the best. You have a conversation. Give context. Explain what you are trying to do and why. The more Claude understands about your situation, the better the answer.

Mistake 2. Not giving enough context

Claude can only work with what you give it. If your question is vague, the answer will be vague. Tell Claude who you are in relation to the question, what you already know, and what you actually need the answer to do for you.

Mistake 3. Stopping after the first answer

The first answer is rarely the best answer. That is how this works. Push back. Ask it to simplify. Tell it what you liked and what missed the mark. Say make this shorter or explain it like I am new to this. The real value comes from that back-and-forth.

One More Tip

Ask for research first, then ask for the output. If you want Claude to write something, ask it to gather its thoughts or research the topic first. Then ask it to produce the final result. You will get noticeably better answers this way.

A QUICK TEST YOU CAN DO RIGHT NOW

Open a new chat. Tell Claude about one real thing you are working on this week. Give it context. Ask for help. Then push back on the first answer and see what happens.

Keep an Eye on Your Usage

Claude is not unlimited. Every message you send and every answer you receive uses something called tokens. Longer chats use more. Stronger models like Opus use more. Deeper responses use more.

To check where you stand: go to Settings, then Usage. You will see your current plan usage over a five-hour window and your weekly limits, and when each one resets.

There is also something called the context window. Think of it as Claude's short-term memory for a conversation. It can only hold so much, your messages, Claude's replies, and anything you have uploaded. As a long chat fills up, Claude starts compressing the earlier parts. If it starts feeling like Claude has forgotten something from earlier in the conversation, that is why. The fix is simple: start a new chat.

YOU ARE DONE

You Are Now Set Up Better Than Most

Seriously. Most people never do any of this. They open Claude, type a question, get a not very good answer, and give up. You have done the setup. You have turned on memory. You have written your instructions. You know about projects, skills, connectors, artifacts, and what belongs where.

It is a real skill and it takes a bit of practice. Same as learning to drive. Nobody does it in an afternoon, and anyone who tells you otherwise is selling something.

The more you use it, the better it gets at knowing how you think. Keep going.

WHAT NEXT



Need help using Claude to actually build your business?



[Book a call](#) and we'll set it up together.