

Set up Claude to work like your business partner

Three prompts to run once, before you prompt anything else. Claude learns your business, saves it to your computer, and follows your rules from then on.

WHY DO THIS

Without context, Claude guesses

Out of the box, Claude knows nothing about your business. So you get generic advice, and you end up re-explaining your offers, customers and tone in every new chat.

This setup fixes that. You do the explaining once. Claude turns it into a small set of files it reads automatically every time you work, so the answers fit your business instead of everyone's.

THE 3 STEPS

1	Let Claude interview you Claude asks about 10–12 questions and writes your business profile.	Claude chat · ~20 min
2	Set up your file structure Claude turns the profile into a folder of files on your computer.	Claude Code or Cowork · ~5 min
3	Make your own CLAUDE.md Claude writes the rule file it reads every session: how to talk to you and work with you.	Claude Code or Cowork · ~10 min

BEFORE YOU START

→ A Claude account.

Step 1 works in any Claude chat at claude.ai or in the Claude app.

→ Claude Code or Cowork for steps 2 and 3.

These are the versions of Claude that can create files on your computer. Regular chat can't. Both require a paid Claude plan. Cowork lives in the Claude desktop app and is the easier option if you've never used a terminal.
Setup instructions: docs.claude.com

→ An empty folder for your business.

Create a new folder anywhere you like, for example in Documents. You'll point Claude at it in step 2.

Let Claude interview you

Claude asks you questions one at a time, then writes a profile of your business in your own words. This profile is the source for everything in steps 2 and 3.

Where to run it: a new chat at claude.ai or in the Claude app.

1 Open a new chat and paste the prompt below.

Claude will reply with its first question. Nothing else happens yet.

2 Answer each question the way you'd explain it to a friend.

Short and honest beats polished. Voice dictation works fine. If you don't know an answer, say so — Claude will mark it "Not covered yet" instead of making something up.

3 When Claude shows MY BUSINESS PROFILE, copy all of it and save it.

Paste it into a note or a text file. You'll need it in step 2.

PROMPT 1 · COPY EVERYTHING IN THE BOX

I want you to become deeply familiar with me, my business, how I think, and how I work so you can act like a useful business partner instead of giving me generic AI advice.

Start by interviewing me.

INTERVIEW RULES:

- Ask ONE question at a time and wait for my answer.
- Keep the interview to roughly 10–12 main questions.
- If my answer is vague or incomplete, ask ONE short follow-up question before moving on.
- Keep questions conversational and direct. Do not make this feel like a corporate questionnaire.
- Do not assume information I haven't given you.

Cover these areas:

1. What my business is, what it does, and where I want to take it.
2. Who my ideal customers are and what problems they pay me to solve.
3. What I currently sell or plan to sell, including pricing and delivery.
4. How customers currently find me and how I want to acquire customers.
5. Why someone should choose me instead of competitors or doing it themselves.
6. How I naturally write, speak, sell, and explain things.
7. Words, phrases, tones, AI clichés, and writing styles I dislike.
8. My biggest goals for the next 90 days.
9. The tasks I repeatedly do every week and approximately how long they take.
10. Which tasks I most want AI or automation to take over.
11. What decisions AI can make independently and what it must ask me before doing.
12. Anything else about how I think or work that would materially improve your ability to help me.

When the interview is finished, create a document called:

MY BUSINESS PROFILE

Use these sections:

- About Me
- Business
- Ideal Customers
- Offers
- Customer Acquisition
- Voice & Communication

- Never Do
- 90-Day Goals
- Repeated Tasks
- Tasks to Automate/Delegate
- Decision Boundaries
- Other Important Context

Write the profile in first person ("I", "my") as though I wrote it myself.

Use my actual wording and terminology wherever possible.

Do NOT invent missing details. If something important was never answered, explicitly write:

"Not covered yet."

Keep the final profile concise and practical. This is context for an AI working with me, not a biography.

Start with question 1.

STEP 2 OF 3

Set up your file structure

Claude turns your profile into a small folder of files: one for your business, offers, customers, voice and goals, plus a CLAUDE.md that tells Claude where everything is.

Where to run it: Claude Code or Cowork, with your empty business folder selected.

1 Start a new session and select your business folder.

In Cowork, choose the folder when starting a task. In Claude Code, open it from the folder you created.

2 Paste your saved MY BUSINESS PROFILE first, then the prompt below, in the same message.

This is a new session, so Claude hasn't seen your profile yet. Pasting it first gives it the source to work from.

3 Check the folder tree Claude shows you, then reply "yes".

Claude shows the plan before creating anything. When it's done, it lists every spot marked "TODO: ask me" — those are gaps you can fill in later.

PROMPT 2 · COPY EVERYTHING IN THE BOX

Using MY BUSINESS PROFILE we just created, build a simple business knowledge system on my computer that Claude Code can use as persistent context.

The goal is simple: when I work with Claude Code, it should quickly understand my business, offers, customers, communication style, goals, and current work without me explaining everything again.

Create exactly this structure:

```
[my-business-name]/
|
├─ CLAUDE.md
├─ README.md
|
├─ brain/
|   └─ business.md
|   └─ offers.md
|   └─ customers.md
|   └─ voice.md
```

```
|   └─ goals.md
|
└─ projects/
    └─ README.md
```

RULES:

1. Use MY BUSINESS PROFILE as the source of truth.
2. Do not invent facts to make the files look complete.
3. If important information is missing, write:
 TODO: ask me
4. Keep every file concise. These should be useful working files, not essays.
5. Use plain lowercase file names exactly as shown.
6. Do not create additional folders or files unless I explicitly approve them.

WHAT GOES WHERE:

brain/business.md

- What the business does
- Business model
- Positioning
- Important business context

brain/offers.md

- Products/services
- Pricing
- Deliverables
- Problems each offer solves

brain/customers.md

- Ideal customer profiles
- Their problems
- What they want
- Buying motivations
- Common objections

brain/voice.md

- How I naturally communicate
- Writing style
- Sales style
- Words/phrases I use
- Words/phrases/styles to avoid
- Examples from my own writing when available

brain/goals.md

- Current 90-day goals
- Longer-term direction
- Important priorities
- Metrics or targets I care about

projects/README.md

Explain that every active project should eventually have its own folder here and briefly explain what information belongs in a project folder.

README.md

Explain the entire folder structure in a few lines so I can understand it immediately.

CLAUDE.md

For now, keep this lightweight.

Tell Claude:

- what each folder/file contains
- when each file should be read
- my hard "never do" rules copied directly from my profile

- not to guess business-specific information that can be found in these files
- that more detailed operating rules will be added in the next step

Before creating anything, show me the proposed folder tree.

Then create the files.

After creating them, show me:

1. The final folder tree
2. A one-line explanation of every file
3. Every place where you had to write "TODO: ask me"

Do not add unnecessary complexity.

STEP 3 OF 3

Make your own CLAUDE.md

CLAUDE.md is the file Claude reads at the start of every session in this folder. This prompt rewrites it into specific rules: how to talk to you, when to ask before acting, and what to never do.

Where to run it: the same Claude Code or Cowork session as step 2.

1 Paste the prompt below.

Claude reads all your files first, then shows you a draft. It won't overwrite anything yet.

2 Read the list of things Claude had to guess.

Correct anything that's wrong in plain words, for example "No, I want short answers, not detailed ones."

3 Approve it, and Claude writes the final CLAUDE.md.

That's it. From now on, every session in this folder starts with Claude knowing your business.

PROMPT 3 · COPY EVERYTHING IN THE BOX

Now audit the business brain we created.

Read:

- the current CLAUDE.md
- every file inside /brain
- projects/README.md
- any existing project files that contain useful information about how I work

Then rewrite the CLAUDE.md at the root of my business folder.

The purpose of CLAUDE.md is to make you operate like an AI business partner who understands me and my business – not a generic assistant.

Organize CLAUDE.md under these headings:

1. ABOUT ME

Who I am, what I do, and what the business does.
Maximum 3 short lines.

2. WHERE INFORMATION LIVES

One short line for each important file/folder explaining:

- what is stored there
- when you should read it

3. HOW TO COMMUNICATE WITH ME

Turn my communication preferences into specific rules.

Examples of the level of specificity I want:

Bad:

"Be concise."

Better:

"Give me the answer first. Add explanation only when it changes the decision."

Bad:

"Be professional."

Better:

"Use direct, conversational language. Avoid corporate filler and AI-sounding phrases."

Include:

- preferred response length
- tone
- formatting
- words/phrases/styles I dislike
- how much explanation I normally want
- how you should challenge weak ideas

4. HOW TO WORK WITH ME

Create specific operating rules for working with me.

Include rules for:

- when to ask before acting
- when you can make reasonable decisions yourself
- when to search my files before asking me a question
- when to challenge my assumptions
- how to handle uncertainty
- how to present plans before large changes
- how to avoid unnecessary complexity

5. NEVER DO

List my hard boundaries.

Preserve every existing "never do" rule unless newer information clearly replaces it.

6. MY PRIORITIES

List my current priorities in order.

Keep this focused on priorities that should actually affect your decisions.

7. REPEATED TASKS

Rank my recurring tasks from most important/frequent to least.

For each, use this format:

[number]. [task] – [frequency] – [approximate time]

8. DECISION RULES

Create short rules Claude can use when choosing between options.

Examples:

- Prefer the simplest solution that achieves the goal.
- Reuse existing systems before adding another tool.
- If an idea is weak, explain why instead of agreeing with me.
- Distinguish facts from assumptions.
- Do not invent business information.

- Check existing context before asking me to repeat myself.

RULES FOR WRITING CLAUDE.md:

- One actionable rule per line whenever possible.
- Every rule should be testable.
- Avoid vague instructions like "be helpful", "be professional", or "give good answers."
- Every rule must come from information already provided by me or logically required to operate the system.
- Do not add generic AI advice.
- Remove duplicated rules.
- Keep CLAUDE.md under approximately 60 lines if possible.
- Prefer specific instructions over explanations.

Before overwriting CLAUDE.md:

1. Show me the proposed new version.
2. Identify anything you had to infer rather than directly learn from me.
3. Ask me to correct those assumptions.

After I approve it, write the final CLAUDE.md.

GOOD TO KNOW

Always work from this folder. Claude only reads your CLAUDE.md when the session is opened in your business folder.

Keep it current. When prices, offers or goals change, just tell Claude: "Update offers.md — new price is ...". Old info gives you old advice.

Fill the TODOs. Every "TODO: ask me" is something Claude will otherwise have to guess. Ask Claude to interview you on just those.

Re-run step 3 every few months so CLAUDE.md keeps up with how you actually work.

Claude, Claude Code and Cowork are made by Anthropic.