

# Five AI employees for your business: the simple version

The five from the video, set up in an afternoon: a chief of staff, social media, finance, sales and customer support. One install, then one sentence each.

## WHAT IT IS

### One free add-on from Anthropic that covers all five

You do not have to build these from nothing. Anthropic, the company behind Claude, publishes a free add-on (a plugin) called **Small Business**. It contains 44 ready-made skills for running a small business. This guide picks the ones that match the five employees in the video and shows you how to switch each one on. You describe what you need in plain words and it picks the right skill.

## WHAT IT DOES

### The five employees and what each one works from

| EMPLOYEE         | WHAT IT DOES FOR YOU                                     | WORKS BEST WITH                               |
|------------------|----------------------------------------------------------|-----------------------------------------------|
| Chief of staff   | Sorts your inbox, drafts replies, briefs you on the week | Your email and calendar                       |
| Social media     | Plans what to post and writes it in your voice           | Nothing required. Canva if you use it         |
| Finance          | Cash forecast, who owes you money, reminder emails       | Your accounting or payment tool, or an export |
| Sales            | Drafts replies to new leads, writes win-back messages    | Your CRM, or pasted enquiries                 |
| Customer support | Drafts answers to customer emails in your tone           | A forwarded or pasted email                   |

Every one of them works without connecting anything: paste an email, upload a spreadsheet export or a PDF. Connecting your tools makes them better, not possible.

## WHAT IT REPLACES

### Being every department yourself

If you run a business alone, you are the inbox, the bookkeeper, the sales follow-up and the support desk. This will not replace you in any of them. It takes the first draft of each job, so you review and approve rather than start from a blank page.

## BEFORE YOU START

### Two things to have ready

#### → A paid Claude plan.

To check: go to [claude.ai](https://claude.ai), click your name (bottom-left) → Settings → Billing. If it says Free, upgrade there first. Plugins need a paid plan.

#### → The Claude desktop app. It includes Cowork, the part of Claude that can work with files on your computer and run plugins.

Download it from [claude.ai/download](https://claude.ai/download) and sign in with the same account. If you already use Claude Code, that works too.

## STEP 1

### Install the Small Business plugin

#### 1 In Cowork, go to [claude.com/plugins](https://claude.com/plugins), find Small Business and install it.

It is made by Anthropic and it is free. This is the click-based way.

Using Claude Code instead? Paste these two lines, one at a time. Both ways give the same result.

```
claude plugin marketplace add anthropics/knowledge-work-plugins
```

```
claude plugin install small-business@knowledge-work-plugins
```

## STEP 2

### Let it learn your business

#### 1 Start a new task and type: get me started

It runs a setup of about 15 minutes: it helps you connect your first two tools, asks about your business, and remembers the answers so every employee below uses them. Answer in your own words. Short and honest beats polished.

## STEP 3

### Switch on each employee

#### 1 Chief of staff

EMAIL + CALENDAR

Turns a full inbox into a short list of what actually needs you, with a draft reply for each. On Mondays it gives you a briefing on your week that you can read in two minutes.

##### SAY THIS

```
Go through my email
```

Also try **Monday brief** and **Brief me**. Connect your email and calendar when it offers; without them, paste or forward the emails you want sorted. It drafts. You read and send.

#### 2 Social media

NOTHING REQUIRED

Keeps a posting calendar and writes captions and scripts that sound like you. It prepares posts for your approval. It does not publish by itself, and it does not edit video.

##### SAY THIS

```
What should we post this month?
```

Then say **Make the content** and **write this in my voice**. Give it three posts you wrote yourself first, so it has your tone to copy. You do the posting.

#### 3 Finance

ACCOUNTING TOOL OR AN EXPORT

Reads your invoices and bills and tells you where your cash is heading over the next 30, 60 and 90 days. It also finds unpaid invoices and drafts the reminder emails.

##### SAY THIS

```
Who owes me money?
```

Also try **Cash forecast** and **Can I make payroll?** It can read QuickBooks, Xero, Stripe or PayPal when connected. No connection? Export a spreadsheet (CSV) from your accounting tool and upload it.

## 4 Sales

CRM OR PASTED ENQUIRIES

Makes sure no new enquiry goes unanswered: it drafts a reply to each lead in your voice for you to approve. It can also find customers who have gone quiet and write each one a win-back message.

SAY THIS

Respond to this lead

Paste the enquiry after it. Also try **Who should I call?** and **Win back quiet customers**. With a CRM connected it finds the leads by itself; without one, paste them in.

## 5 Customer support

A FORWARDED EMAIL

Reads a customer email and drafts a reply in your tone. If your payment or shop tool is connected, it can look up the order first.

SAY THIS

Answer this customer

Paste or forward the email after it. Also try **A customer is upset**. Read every reply before it goes out, especially anything about refunds.

WHAT TO EXPECT

### This is the simple version

Follow this guide and you will have five working assistants by the end of the day. They will be useful, and they will also be generic in places, because they only know what you told them in a 15-minute setup.

Three things this version does not do:

| NOT IN THIS GUIDE        | WHAT IT MEANS IN PRACTICE                                                      |
|--------------------------|--------------------------------------------------------------------------------|
| Tuned to your business   | Your offers, prices, rules and exact tone built into each employee             |
| Running without you      | On a schedule, so the inbox is sorted and leads are drafted before you wake up |
| All your tools connected | Email, calendar, CRM and accounting wired in and tested together               |

That fuller build is what we work on together inside the PathionAI community. **Join the community. The link is on my profile.**

GOOD TO KNOW

**Nothing goes out without your yes.** The plugin pauses before it sends, posts or pays anything. Keep it that way. **“Employee” is a nickname.** These are assistants that prepare work; you are still the one who decides. **It is not an accountant or a lawyer.** Anthropic says so itself: check financial, tax and legal output with a professional. **Start with one.** Use the chief of staff for a week before you switch on the rest. **Be careful what you connect.** Only connect accounts you would be comfortable letting an assistant read.