

Your AI team: 10 agents for your business

Inbox, support, sales, marketing, reviews, finance, research, hiring, a phone receptionist and a chief of staff who briefs you. One free add-on, one sentence each, and a schedule so they work while you don't.

WHAT IT IS

Ready-made skills from Anthropic, inside the Claude desktop app

You do not build these from nothing. Anthropic, the company behind Claude, publishes a free add-on (a plugin) called **Small Business** with 44 ready-made skills for running a business. This guide shows which skill becomes which agent, what to say to switch it on, and how to put it on a schedule. You talk to it in plain words; it picks the right skill.

THE TEAM

Ten agents in three groups, plus the boss

AGENT	WHAT IT DOES FOR YOU	SKILL IT USES
THE FRONT DESK		
Inbox	Sorts your email, drafts replies for you to approve	inbox-manager
Support	Drafts answers to customer questions in your tone	ticket-deflector
Receptionist	Answers the phone. Needs a phone service; Claude writes its script	see page 3
BRING MONEY IN		
Sales	Replies to new leads fast, wins back quiet customers	speed-to-lead, reactivate
Marketing	Plans posts and writes them in your voice	social-content-engine
Reviews	Asks happy customers for reviews, drafts replies	review-reputation
RUN THE BUSINESS		
Finance	Who owes you, reminder emails, your cash for the next 90 days	invoice-chase, cash-flow-snapshot
Research	Briefs you on what your competitors changed	competitive-brief (Marketing plugin)
Hiring	Writes the job post, ranks the applications	job-post-builder, hiring-screener
THE BOSS		
Chief of staff	One short brief on the whole business, every morning or Monday	business-pulse, monday-brief

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. These agents take the first draft of each job, so you approve instead of starting from a blank page.

Two things to have ready

→ **A paid Claude plan** (Pro, Max, Team or Enterprise). Plugins and schedules are not on the free plan.

To check: go to claude.ai, click your name (bottom-left) → **Settings** → **Billing**. If it says Free, upgrade there first. On Team or Enterprise, your admin may need to allow plugins.

→ **The Claude desktop app**, for Mac or Windows. Download it from claude.ai/download and sign in with the same account. The agents live in its **Cowork** tab.

1 Install the Small Business plugin.

Open the desktop app, switch to the **Cowork** tab, click **Customize** in the left sidebar → **Browse plugins**. Find **Small Business** and click **Install**. It is made by Anthropic and it is free. Install **Marketing** the same way for the research agent.

2 Start a new task and type: get me started

A setup of about 15 minutes. It asks about your business, helps you connect your first two tools (start with email and calendar) and remembers your answers, so every agent below uses them. Short and honest answers beat polished ones.

3 Switch on each agent with one sentence.

Type the words in the middle column. Nothing needs to be connected: you can paste an email or upload a spreadsheet instead. Connecting the tool on the right makes it better.

AGENT	SAY THIS	BETTER WITH
Inbox	Go through my email	Your email connected
Support	Answer this customer , then paste their message	Your shop or payment tool, to look up orders
Sales	Respond to this lead , then paste it. Also: Win back quiet customers	Your CRM (customer list)
Marketing	What should we post this month? then Make the content	Three posts you wrote, for your tone. Canva if you use it
Reviews	Help me get more reviews and Reply to these reviews , then paste them	A list of recent happy customers
Finance	Who owes me money? Also: Cash forecast	Your accounting or payment tool, or a CSV export
Research	Competitive brief on and name 2–3 competitors	Their website addresses
Hiring	Write a job post , later Screen these applications	The applications as files or pasted text
Chief of staff	Brief me . On Mondays: Monday brief	Email, calendar and money tools connected

4 Put the regular ones on a schedule.

In Cowork, click **Scheduled** in the left sidebar → **New task** → **Create with Claude**. Describe the job and how often, answer its questions, check the name and time, click **Schedule**. Choices are hourly, daily, weekdays or weekly. Scheduled tasks run even when your computer is asleep, except ones that need files on your computer.

Every weekday at 7:00, brief me on my email, calendar and who owes me money.

Every Monday at 8:00, give me a competitive brief on my three competitors.

The one Claude cannot do alone

Claude cannot pick up a phone call. For calls you need an AI phone answering service (search "AI receptionist"; most offer a trial). Claude still does the hard part of setting it up well:

- **Write its script:** Write a phone script for my receptionist: how to greet callers, my opening hours, prices, the 10 questions people ask most, and when to take a message.
- **Handle what it records:** paste the call summaries or voicemails into Claude and say **Turn these into replies and bookings.**

WHAT TO EXPECT

This is the starter version

By the end of a day you will have working agents. They will be useful and also generic in places, because they only know what you told them in a 15-minute setup.

NOT IN THIS GUIDE	WHAT IT MEANS IN PRACTICE
Tuned to your business	Your offers, prices, rules and exact tone built into each agent
All your tools wired together	Email, calendar, CRM, accounting and phone connected and tested as one team
Your own custom agents	The jobs only your business has, turned into agents of their own

GOOD TO KNOW

- **Nothing goes out without your yes.** Anthropic built every skill to pause before it sends, posts or pays anything. Keep it that way.
- **"Agent" is a nickname.** These prepare the work. You still decide.
- **Start with one.** Run the inbox agent for a week before you switch on the rest.
- **Marketing writes, it does not edit video.** It plans and drafts posts; you post them.
- **It is not your accountant or lawyer.** Check money, tax and legal output with a professional.
- **Connect carefully.** Only connect accounts you would let an assistant read.

WANT THE FULL BUILD

Your team, set up for your business

The tuned version, with your tools wired in and agents for the jobs only your business has, is what we build together inside the PathionAI community. Join the community. The link is on my profile.