WORKSHOP · NO SYSTEM TOUR NEEDED

Claude Code 101

Your AI teammate on your own computer: how to start, how to ask, how to stay safe, and three first projects for a small business.

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SERVICES THAT YOU CAN TRUST

WHAT IT IS

A teammate in a folder you choose

You decide. It reads, writes, runs and checks. You approve.

THE OWNER

You

Goal, context, decisions. You approve the result.

→

THE TEAMMATE

Claude Code

Plans the work, writes, edits, runs small programs, checks its own output.

→

THE WORKSPACE

Your folder

Documents, spreadsheets, scripts, notes. Only what you put there.

→

OUT

Result

Ready for review

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HOW TO START

Four steps to your first win

STEP 1

Install

Desktop app or terminal. Sign in.

STEP 2

Pick a folder

One folder per project. Start small.

STEP 3

Describe the goal

Plain words: what, why, what 'done' looks like.

STEP 4

Review & approve

Read it, test it, then use it.

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FILES AND FOLDERS

Organize first, then ask

A tidy folder is half the prompt.

My-Business/

CLAUDE.md ← house rules

clients/

marketing/

proposals/

finance-reports/

archive/

ONE SMALL FILE

CLAUDE.md = the house rules

Who you are, your tone, your rules: 'never send email without my OK', 'US spelling', 'prices from price-list only'.

SAFETY

Keep secrets out

Passwords, bank and ID numbers never go in the folder or the chat. Use the official login screens.

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ASKING FOR WORK

A good ask has four parts

GOAL
What you want

CONTEXT
Who it's for, files to use

LIMITS
Tone, length, what not to do

DONE WHEN
How you'll check it

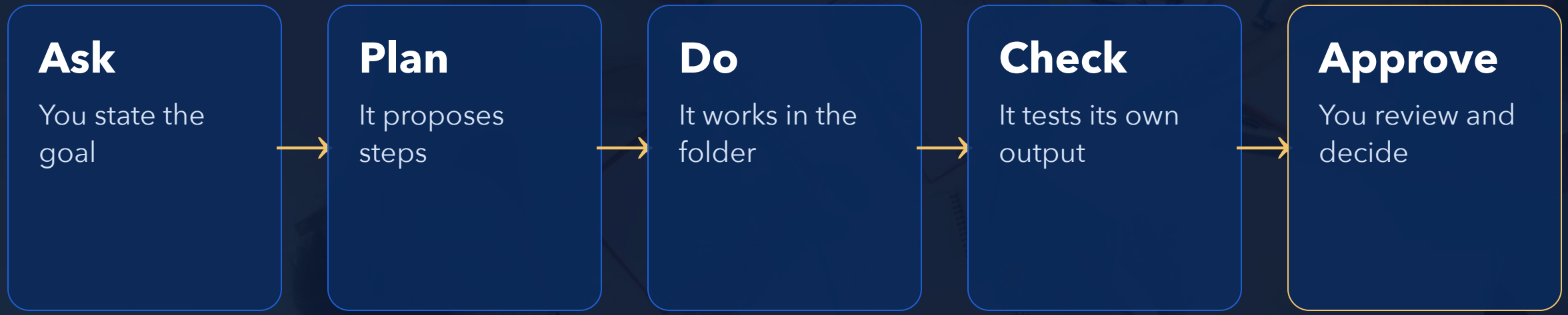
EXAMPLE

"Draft a follow-up email for each client in clients/ who had a quote in October but hasn't replied. Friendly, under 120 words, mention their quote number, no discounts. Put the drafts in follow-ups/ as one file each. Done when every unanswered quote has a draft and a list shows who got one."

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THE WORK LOOP

Ask → plan → do → check → you approve



Stop early, stop cheap: fix the plan before the work starts.

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SKILLS

Write it once, reuse it every week

A skill = saved steps + template + checks.

RECIPE 1

Weekly newsletter

Pull this week's events, write in our voice, add the join link, leave as a draft.

RECIPE 2

Proposal builder

Client notes in, a priced proposal from the price list out, ready for review.

RECIPE 3

Meeting follow-up

Recording notes in, action items and a thank-you email draft out.

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AGENTS

One lead, helpers in parallel

ORCHESTRATOR

Lead

Splits the job, merges the results, reports to you

HELPER 1

Research

Finds facts and sources

HELPER 2

Writer

Drafts the piece

HELPER 3

Checker

Tests and proofreads

CONNECTORS

Connected to your tools, with permission

Email

Read and draft. You press send.

Calendar

Find times, add events you approve.

Docs & drives

Read files, write new versions.

CRM

Update contacts and notes.

Start read-only

Then allow drafts

Sending stays human

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SAFETY AND GUARDRAILS

A human signs off on every result

A person signs off

Nothing is sent, posted, paid or filed without a human OK.

Least access

Only the folders and tools the job needs.

No secrets in chat

Passwords, bank and ID numbers stay out.

Review before release

Read it, test it, fact-check it.

Keep a log

What was asked, what was done, who approved.

Policies first

Your company rules beat any shortcut.

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FIRST 3 PROJECTS FOR A SMALL BUSINESS

Start where the hours leak

PROJECT 1

Inbox follow-ups

Unanswered quotes and leads get a personal draft every morning. You review and send.

PROJECT 2

One recording, a week of content

One meeting or video becomes a post, an email and a short summary in your voice.

PROJECT 3

Quote and proposal builder

Client notes plus your price list become a clean proposal draft in minutes.

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A DAY WITH AN AI TEAMMATE

What changes in a normal day

MORNING

Drafts are waiting

Follow-ups, today's agenda, a summary of yesterday.

MIDDAY

Work in parallel

Proposal drafted while you're on a call.

AFTERNOON

Content from your day

Your meeting becomes tomorrow's post.

EVENING

Review in 15 minutes

Approve, edit or reject. Nothing leaves without you.

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MISTAKES TO AVOID

Four ways people get burned

Vague asks

No 'done when' means no finish line.

Skipping review

Confident text can still be wrong.

Handing over the keys

Never share passwords or banking access.

One giant task

Break it into small, checkable steps.

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YOUR NEXT STEP

Build your first AI teammate with us

Open office hours

Tue & Thu 1 PM CT on Zoom: free discovery calls.

Workshops

Weekly hands-on sessions inside the community.

Cohorts of 6–15

Your team or network learns and builds together.

pureexpertz.com/join

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