Claude Business Setup Worksheet

One page to set up Claude for your business.

1. Business profile

[ ] What you sell, in one sentence
[ ] Who you serve, in one sentence
[ ] Your voice rules (3 do's, 3 don'ts)

2. Projects

[ ] Project 1 (repeat job): _____
[ ] Project 2 (repeat job): _____
[ ] Facts and files added to each project

3. First workflow

[ ] Task: _____
[ ] Inputs: _____
[ ] Output format: _____
[ ] Review step before sending: YES

Pickzox bonus — free with Claude Business Brain via our link.