AI with Harry

FREE GUIDE

15-Minute Claude Setup Checklist



Version 1.0 · Written November 2026
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Set up Claude once so it knows how you work, remembers what matters and connects to your tools.

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> **Things change fast.** Anthropic reorganizes Claude's settings often. Menu names below come from Anthropic's help pages in November 2026. If something has moved, look for the closest label ("Settings", "Customize", "Capabilities") or search Anthropic's help center at support.claude.com.

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1. Account and apps (2 minutes)

- □ Sign up at claude.ai with the email you use for work.
- □ Install the apps you'll actually use: desktop (Mac or Windows) and mobile (iOS or Android). Find them at claude.com/download. Your chats and settings follow your account.
- □ Turn on two-step sign-in for the email account you use with Claude. Never share your login.

2. Pick a plan (2 minutes)

From claude.com/pricing in November 2026 (prices in USD, before tax; check the page, because plans change):

Plan	Price	Who it suits
Free	$0	Trying Claude. Includes memory, skills, connectors and up to 5 projects, with limited usage.
Pro	$20/month, or $17/month billed yearly	Most solo business owners. More usage, unlimited projects, Claude Code.
Max	$100/month	Heavy daily use (about 5x Pro usage).
Ultra	$200/month	Very heavy use (about 10x Pro usage weekly).
Team	From $25 per seat/month ($20 billed yearly)	2–150 people who want shared projects, admin controls and billing.

- □ Start on Free for a week. Upgrade if you keep hitting the usage limit.

3. Profile instructions (3 minutes)

These apply to every chat. Keep them about *you*, not your whole business.

- □ Click your initials (bottom left) → **Settings**. Look for **Instructions** (in the "Your Claude" section in the newer layout; under your profile or account in older ones).
- □ Paste and fill in:

```
I'm [NAME], [ROLE] at [BUSINESS], a [TYPE OF BUSINESS] serving [CUSTOMERS] in [AREA].
Write in plain US English. Keep answers short unless I ask for detail.
Use headings and bullet points for anything longer than a few paragraphs.
Ask me one clarifying question when a request is ambiguous instead of guessing.
If you're not sure about a fact, say so.
```

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4. Projects (2 minutes)

A project keeps files, instructions and chats for one area of work together.

- □ Open **Projects** in the sidebar → create a new project. Free accounts can have up to 5.
- □ Make one project per big area, for example "Marketing", "Clients" or "Admin".
- □ Add project instructions (for example "All content is for Instagram and email. Audience: [AUDIENCE].") and upload 2–3 key files: price list, FAQ, a good past example.
- □ Don't upload anything with customer personal data, passwords or bank details.

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5. Memory (1 minute)

Claude can remember useful context from past chats.

- □ In **Settings**, find the memory options (under "Your Claude" in the newer layout; a "Memory" or "Capabilities" section in older ones). Turn on **Generate memory from chats** if you want Claude to remember context, and decide whether to keep **Search and reference chats** on.
- □ For a one-off private conversation, use an incognito chat (available on all plans).
- □ You can review and edit what Claude remembers at any time in the same place.

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6. Connectors (3 minutes)

Connectors let Claude read from tools you already use (for example Google Drive, Gmail, Notion, Slack).

- □ Open **Customize** → **Connectors**, then **Discover** (or **Browse**) to see the directory.
- □ Connect **one** tool you use daily. Read the permissions screen before you approve.
- □ Prefer read-only access where it's offered. Only connect tools from the official directory or from companies you trust.
- □ Follow privacy law (for example GDPR) for any customer data Claude can now see.

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7. Skills (2 minutes)

Skills are reusable instructions Claude loads when your request matches.

- □ **Settings** → **Capabilities** → turn on **Code execution and file creation** (newer layouts may say **Create and edit files**). Skills won't appear without it.
- □ **Customize** → **Skills** → turn on Anthropic's document skills (Word, Excel, PowerPoint, PDF) and **skill-creator**.
- □ Add your own brand skill (see our free `SKILL.md` template). Only install skills from GitHub after reading them (see our free `SKILLS.md` list).

Check it worked

Start a new chat and paste:

```
Without looking anything up, tell me what you know about me and my business from my instructions, memory and enabled skills. Then list which connectors and skills you can use in this chat. Keep it to 10 lines.
```

You should see your profile details, your business basics, and the connectors and skills you switched on. If something's missing, go back to that step.

Want the full kit?

This checklist gets the basics in place. The kits go deeper:

- **Business Brain Skill ($9):** build a skill that knows your voice, offers, prices and FAQs.
- **Claude Skills Toolkit ($12):** find, vet and install the best free skills safely.
- **Claude Connectors & MCP Setup ($12):** connect Claude to your email, files and tools, safely.

Everything in one place: the **All-Access Pass ($39, lifetime updates)**, which includes every kit above and every future kit.

Every kit comes with the **10-hour guarantee**: set it up as the guide says and save 10 hours a week, or get your money back. Stuck on setup? You get a free 1-on-1 call.

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