AI DECODED HTX · THU NOV 19, 2026 · SETUP SHEET

# Hire your first AI employee with Claude

**35 min**
A to Z · tick each step as you go

**BEFORE YOU START**

- Laptop + charger
- Your work email login (a Google account is easiest)
- ONE task you want to hand off first

**THE 3 RULES — EVERY TIME**

1. **Sample/fake details in the room tonight. Real client details only when you choose to add them at home.**
2. **AI drafts, you decide. Check every name, price, date and time — AI will invent one if you let it.**
3. **You press send. Nothing goes out without you.**

## A. Sign in **3 min** · minute 0→3

Go to **claude.ai** and sign up free. Fastest: **Continue with Google** using the same Google account as your work email. Open your first chat.

→ **You're in.**

## B. Name your employee **2 min** · minute 3→5

Pick a name for your AI employee. It goes into the handbook in Step D, and you'll talk to it by name from now on.

**My employee's name:** _____

## C. Open its office **4 min** · minute 5→9

Left sidebar: **Projects → + New Project**. Name it **[Your Business] HQ**.

A Project is its office: everything about your business lives here. Start every job with a **new chat inside this Project**.

*Don't see "Set project instructions"? Save the Step D text in a file called instructions and add it to the Project instead — same result.*

## D. Give it its handbook **5 min** · minute 9→14

In your Project, click **Set project instructions**, paste this, fill in the blanks, then click **Save instructions**.

**EMPLOYEE HANDBOOK**

You are [NAME], my AI employee for [BUSINESS NAME].
We help [WHO] with [WHAT]. My services are: [LIST].
My hours are: [HOURS]. Write like me: warm, short, plain English, no sales talk.
Your rules:
1. Draft it — never send it. I review and I send.
2. Never invent a price, date, time, or detail I didn't give you. If you don't know, say so and ask me.
3. Never use a real client's private details unless I paste them in this chat on purpose.
4. End every job by telling me: what you did, and what I need to check.

## E. Teach it your business **5 min** · minute 14→19

In the Project's files panel, click **+** and upload a file or paste text:

• services and prices • your hours • the 10 questions customers ask most, with your answers • 2–3 emails or messages you wrote that sound like you (pick ones with no client details)

> **Facts go in as files. Guesses don't go in at all.**

## F. Connect its tools **7 min** · minute 19→26

Click your name → **Customize → Connectors** (or in a chat: **+ → Connectors**). Connect **Gmail**, then **Google Calendar**, then **Google Drive**: sign in with the same Google account and approve each one.

Back in a Project chat, tap **+ → Connectors** and check all three are switched on.

**It can draft and organise. It asks before it sends. You stay the boss.**

*Connector not on your screen or plan, or Google says your admin has to approve? Skip it — tonight you can paste an email in or upload a file instead. Nothing else changes.*

## G. First test **3 min** · minute 26→29

Start a **new chat inside [Your Business] HQ**, paste this fake job, and check the result together: names, dates, prices.

**SAMPLE TEST JOB**

Here are my messy notes from today: call Mrs J back about Thursday, order towels, invoice for the Johnson job — did they pay?, post the Tuesday special, check Friday's schedule.
Turn this into a to-do list grouped by Call / Order / Post / Invoice, with one next step for each. Do not invent dates or amounts.
Then draft the first reply on the list.

## H. Assign its first real job **5 min** · minute 29→34

Pick **ONE**. Paste it into a new Project chat, fill the blanks with made-up details tonight, and run it.

**1. MORNING SORT (ADMIN)**

Look at the emails I paste in below. Sort them into: Reply today / Can wait / Just information. Draft a short reply to the first one. Do not invent any details.

**2. FOLLOW-UP DRAFTS (MISSED LEADS)**

Write a friendly message for someone who asked about booking 2 days ago and went quiet. Warm, not pushy, under 60 words, end with one clear yes/no question. Use only the details I give you: [DETAILS].

**3. CLIENT PREP (APPOINTMENTS)**

Using my calendar details below, make me a one-page prep for tomorrow: who I'm seeing, what each appointment is for, and anything I still need from each person. Flag anything missing — do not guess.

## I. Make it a routine + finish **1 min** · minute 34→35

Save the prompt that worked back into your Project (**+** in the files panel, paste it as text).

**Tomorrow's first job:** _____

**YOU'RE DONE WHEN...**

- [ ] My AI employee has a name and an office (Project)
- [ ] It has my handbook and my business facts
- [ ] Email / calendar / docs connected (or I know my fallback)
- [ ] It finished its first job and I checked the result
- [ ] I know the one job I'm giving it tomorrow morning

**STUCK?**

**Can't sign in?** Use the same email you registered with; check spam for the login link.

**Don't see Projects or Connectors?** Use the fallbacks in Steps C/F. You can still finish every other step tonight.

**Stuck for more than 2 minutes?** Raise your hand. Don't lose your 35 minutes to one screen.