

GUIDE

The Claude setup guide

How to set up Claude so it actually works for your team. Five steps, no fluff, ready by Friday.

| | | |
|----------|------------------|----------------------|
| 5 | ~2 hrs | Day 1 |
| steps | total setup time | team starts using it |

This guide covers everything you need to go from a blank Claude account to a working setup your team uses every day. Each step builds on the last. Follow them in order.

Written by Suwaid Khan, founder of Essen Digital Group. Suwaid trains professional teams to use Claude for real work: reporting, research, client communication, and internal ops.

OVERVIEW

What this guide covers

Most teams sign up for Claude, open the chat, ask a few questions, and stop there. That is like buying a workshop full of power tools and only using the flashlight.

This guide walks you through five setup steps that turn Claude from a chat window into a working tool your team relies on. You will set up your account, build your first memory file, create a reusable project, write your first workflow, and get your team onboarded.

WHO THIS IS FOR

Three types of teams

| Team type | What you will get |
|--------------------------|---|
| Ops and product teams | A setup that handles weekly reporting, status updates, and document drafts. |
| HR and L&D teams | A training-ready environment your staff can learn in safely. |
| Founders and small teams | A single setup that covers research, outreach, and internal docs. |

You do not need any technical background. If your team can use email and Google Docs, they can follow this guide.

THE FIVE STEPS

Step 1

Pick the right plan

Claude has three plan tiers: Free, Pro (\$20/month per user), and Team (\$25/month per user, billed annually). For a team of 2-10 people doing real work, start with Pro. Team plan adds admin controls and higher usage limits. You can upgrade later.

Go to claude.ai and create an account with your work email. Use a shared domain (yourcompany.com) so your team can be grouped later if you move to the Team plan.

Quick decision: If your team has fewer than 5 people, start everyone on Pro. If you have 5 or more, go straight to Team for the admin dashboard and shared projects.

Step 2

Build your first memory file

Claude remembers nothing between conversations unless you tell it to. A memory file is a plain-text document that gives Claude context about your team, your work, and your preferences. Think of it as a briefing doc for a new hire.

Open Claude, go to Settings, and find the "Memory" or "Instructions" section. Paste a file that includes:

| What to include | Example |
|-----------------------------------|--|
| Your company name and what you do | "Acme Corp sells inventory management software to mid-market retailers." |
| Your role and team | "I lead a 6-person ops team. We handle weekly client reporting." |
| Tone preferences | "Write in a direct, professional tone. No jargon. Short sentences." |
| Tools you use | "We use Notion for docs, Slack for comms, HubSpot for CRM." |
| Common tasks | "I often need help drafting status updates and summarizing meeting notes." |

Keep it under 500 words. Update it when your team changes tools, hires someone, or shifts priorities. This single file makes every conversation 10x more useful because Claude starts with context instead of guessing.

Step 3

Create a reusable project

Projects in Claude are containers that hold instructions, files, and conversation history for a specific type of work. Instead of re-explaining your context every time, you set it up once and reuse it.

Start with one project for your most repeated task. For most teams, that is weekly reporting or status updates.

How to create your first project:

| Action | Details |
|-------------------------------------|---|
| 1. Open Claude and click "Projects" | You will see a list of existing projects (probably empty). |
| 2. Click "Create Project" | Give it a clear name: "Weekly Client Report" or "Meeting Summaries". |
| 3. Add project instructions | Tell Claude what this project is for, what format you want, and any rules. Example: "Summarize meeting notes into a weekly report." |
| 4. Upload reference files | Drop in a sample report, a template, or a style guide. Claude will use these as examples. |
| 5. Start a conversation | Every new chat inside this project starts with your instructions and files already loaded. |

One well-built project saves more time than 50 one-off conversations. Most teams end up with 3-5 projects covering their core workflows: reporting, drafting, research, and internal comms.

Step 4

Write your first workflow

A workflow is a multi-step instruction set that Claude follows to produce a specific output. It is the difference between asking Claude a question and giving Claude a job.

Pick a task your team does weekly. Write it as a step-by-step instruction Claude can follow every time.

Example: weekly status report workflow

| Step | Instruction to Claude |
|------|---|
| 1 | Read the attached meeting notes from this week. |
| 2 | Pull out every decision made, every action item assigned, and every deadline mentioned. |
| 3 | Write a 3-section status update: Progress (what got done), Decisions (what was agreed), Next week (what is coming). |
| 4 | Keep it under 400 words. Use bullet points for action items. Name who owns each item. |
| 5 | Add a one-line summary at the top I can paste into Slack. |

Save this workflow in your project instructions. Every time you start a new conversation in that project and drop in meeting notes, Claude follows the same steps. Consistent output, no re-explaining.

Three more workflows to build next:

1. Email draft from bullet points (give Claude bullets, get a polished email).
2. Meeting prep (give Claude an agenda and attendee list, get a briefing doc).
3. Document summary (give Claude a long PDF, get a one-page summary with key findings).

Step 5

Onboard your team

The best setup is useless if your team does not use it. Here is how to get people started without a formal training session.

| Week | What to do |
|--------|--|
| Week 1 | Share one project with the team. Walk through it in 10 minutes at a standup. Let them try it with their own notes. |
| Week 2 | Ask each person to bring one task they did manually this week. Build a workflow for the best candidate together. |
| Week 3 | Review what is working. Remove any project instructions that are too vague. Tighten the ones that produce good outcomes. |
| Week 4 | Each team member should have 1-2 workflows they use regularly. Check in: is anyone stuck? Is anyone not using it? |

The goal is not 100% adoption on day one. The goal is one useful workflow per person by the end of the month. Once someone saves two hours on a real task, they do not go back.

COMMON MISTAKES

Five things that kill team adoption

| Mistake | What to do instead |
|---------------------------------------|--|
| Starting with no memory file | Build the memory file first. It takes 15 minutes and changes everything. |
| Giving Claude vague prompts | Write specific instructions. "Summarize this" loses to "Write a 200-word summary with 3 bullet points". |
| Expecting perfection on the first try | Treat the first output as a draft. Edit the instructions, not the output. The workflow improves with iteration. |
| Signing up the whole team at once | Start with 2-3 people. Let them build confidence. Then expand. |
| Using Claude for everything | Start with one task. Get it working. Then add the next. Trying to replace 10 tools on day one is a recipe for failure. |

Want this done for you?

This guide covers the basics. For teams that want a production-grade setup with custom memory files, workflows, automations, and team onboarding built in a single engagement:

| Claude AI Masterclass | Claude Setup | AI Advisory |
|--|--|---|
| Half-day or full-day facilitated team training | Full environment build: memory, projects, workflows, automations | Ongoing monthly advisory. 1-2 calls + async access. |
| From \$300/session | \$2,000 flat | \$1,000/month |

Book a free 30-minute discovery call at essentrainings.com