

Set Up Your AI Assistant in 20 Minutes

Six steps. Do them in this order and stop worrying about the rest.

The assistant is Claude, the one I use every day. Most people open Claude in a browser tab, ask it one question, and decide it's overrated.

That isn't Claude. That's a fraction of Claude. This is the order I'd set it up in if I were starting today.

Read time: 2 minutes. Doing time: about 20. You don't need to code, and you don't need to finish it in one sitting. You can get most of the way through this list before deciding whether to pay.

1. Get the desktop app

Do this: download Claude for desktop and sign in. Stop using the browser tab.

Why it matters: the desktop app is the only version that can reach the files on your computer. Everything good later in this list depends on that.

Skip for now: the phone app. It's useful later for quick questions, it is not where you set things up.

✓ **You'll know it worked when** Claude is running in its own window, not a browser tab.

2. Set up Projects

Do this: create one Project. Name it after something real you're working on. Put a few sentences in its instructions describing what it is and who it's for.

Why it matters: a Project is a workspace that remembers context. Without one, you re-explain yourself every single time. With one, every conversation inside it already knows the background.

Skip for now: making ten Projects. Make **one**. Most people never need more than three.

✓ **You'll know it worked when** you start a new chat inside the Project and it already knows what you're talking about without being told.

3. Turn on Connectors

Do this: open Connectors and switch on **one**. Gmail or your calendar is the easiest first.

Why it matters: a Connector lets Claude actually see your stuff instead of you copy-pasting into it. That's the difference between asking for advice and handing over a job.

Skip for now: connecting everything you own. One connector, used properly, teaches you more than six switched on and ignored. And if a connector shows as unavailable on your plan, skip it and move on.

Availability varies by plan and account type, and nothing else on this list depends on it.

✓ **You'll know it worked when** you can ask "what's in my inbox from this week?" and get a real answer about your real inbox.

4. Create one Skill

Do this: think of a task you do the same way every time. Write down how you do it, step by step, and save it as a Skill.

Why it matters: a Skill teaches Claude your process once. After that it pulls that process in automatically whenever the task comes up. You stop re-explaining your own method.

Skills need code execution switched on in your settings. If the option looks dead, that's why.

Skip for now: trying to write Skills for everything at once. Write one, for the task you're most tired of explaining.

✓ **You'll know it worked when** you ask for that task plainly and Claude follows your steps without being reminded of them.

5. Go paid

Do this: upgrade to a paid plan. The entry paid plan is enough. You do not need the expensive tier to start.

Why it matters: Cowork, the next step, needs a paid plan. And whatever the free plan lets you try, it runs out mid-thought once you actually start using Claude properly.

Skip for now: comparing every tier. Start on the entry plan, use it hard for a month, and upgrade only when you actually feel the ceiling.

I'm not going to promise you'll make the money back. That depends entirely on what you use it for. What I can tell you is that you can try most of this list first and decide with your own hands.

✓ **You'll know it worked when** you stop seeing usage warnings after a few messages.

6. Move up to Cowork

Do this: open Cowork and give it a job that involves your actual files.

Why it matters: this is the jump. Everything before this talks about the work. Cowork goes and does it. It plans it, works through your files, and comes back with it finished.

Skip for now: the web and mobile versions of Cowork. They can only reach your files through the desktop app while it is open, so at this stage they just add moving parts. **Start with the desktop one.**

✓ **You'll know it worked when** it produces or changes a real file on your computer without you doing it by hand.

What to ignore completely, for now

You will read about all of these. None of them matter yet.

- **Which model to pick.** The default is the right one until you have a reason it isn't.
- **Prompt engineering courses.** Say what you want in plain words. That works.
- **The API.** It's for developers building products. You're not doing that today.
- **Every new tool that launches this month.** Get these six steps working first.

Now actually do something

Setup means nothing until you give it a job. Copy one of these in.

1. Brief it on your work *(do this one first, it makes everything else better)*

Ask me 10 questions about what I do and who I do it for. Then turn my answers into a short briefing document I can add to this Project.

2. Triage your inbox *(needs step 3)*

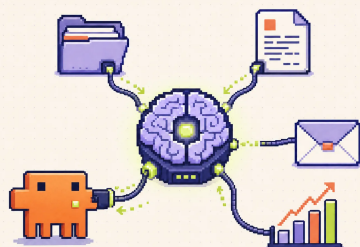
Go through my inbox from the last month and give me a list of what actually needs a reply, most urgent first. Then draft a reply to the top three.

3. Hand over something real *(needs step 6)*

Read the files in this folder, then write me a one-page summary of what's in there and what's missing.

Ready for the **paid** step?

The free guides get you started. These are the full systems I run my own work on. One-time prices, plain English, 14-day money-back.

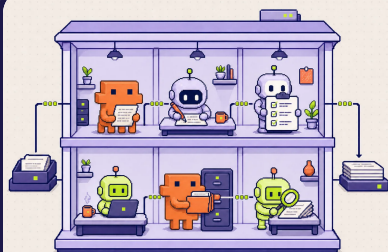


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