



Claude for Beginners

How to Use AI to Run Your Business
More Efficiently

No tech skills required. If you can type an email,
you can do everything in this book.

Why Every Business Owner Needs to Know This

You are already doing the work of three people. Answering messages, writing emails, keeping the books straight, posting on social media, following up with customers. There are only so many hours in a day.

Claude is an AI assistant made by a company called Anthropic. Think of it as a very fast, very smart helper that lives in your web browser. You type what you need in plain English, and it writes it, organizes it, or explains it for you.

This book will take you from never having used it to handling real business tasks with it in one week.

What Is Claude, Really?

Forget the hype. Here is the simple version:

- **Claude is a website you talk to.** You type a request, it types back an answer. That is the whole thing.
- **It writes, summarizes, plans, and explains.** Emails, social posts, checklists, simple spreadsheets, business plans, you name it.
- **It does not know your business until you tell it.** The more detail you give, the better the answer. Vague in, vague out.
- **The free version is enough to start.** You can do everything in this book without paying a dime.

Try this right now: go to claude.ai, create a free account, and type: *"Hi Claude, I run a small [your type of business]. What are 5 ways you could save me time each week?"* Read what it says. That is your starting line.

Your First Conversation: The 4-Part Prompt

A prompt is just your request typed out. Good prompts have four parts. You do not need all four every time, but using them makes a huge difference.

- **1. ROLE:** who you want Claude to act as. *Example: "Act as my marketing assistant."*
- **2. TASK:** what you want done. *Example: "Write a Facebook post about my spring cleaning special."*
- **3. DETAILS:** the facts it needs. *Example: "My business is a cleaning service in Dallas. The special is 20% off deep cleans in April."*
- **4. FORMAT:** how you want it delivered. *Example: "Keep it under 100 words with an emoji and a call to action."*

Put together, it looks like this:

"Act as my marketing assistant. Write a Facebook post about my spring cleaning special. My business is a cleaning service in Dallas. The special is 20% off deep cleans in April. Keep it under 100 words with an emoji and a call to action."

Copy that structure, swap in your details, and you will get useful answers from day one.

5 Ways to Use Claude in Your Business This Week

1. Write it for you

Emails, captions, product descriptions, responses to reviews. Anything you stare at a blank screen for.

"Act as my executive assistant. Draft a polite email to a customer who missed their appointment. Offer to reschedule and keep it warm and professional, under 120 words."

2. Shrink it down

Paste in long articles, contracts, or meeting notes and ask for the short version.

"Summarize the following text in 5 bullet points, written so a busy business owner can understand it in 60 seconds: [paste your text here]"

3. Plan it out

Content calendars, launch checklists, weekly schedules. Tell it the goal, get the plan.

"Act as a business coach. Make me a simple 4-week social media plan for my [type of business]. 3 posts per week. Give me the topic and one sentence about each post."

4. Explain it simply

Tax forms, legal letters, tech instructions. Ask it to translate jargon into plain English.

"Explain [topic, e.g. 'quarterly estimated taxes'] like I am a smart business owner with no accounting background. Use a simple example with numbers."

5. Organize your thoughts

Brain dumps in, clean lists out. Great for SOPs, to-do lists, and procedures.

"Turn these rough notes into a clean numbered checklist my employee can follow: [paste your rough notes here]"

Your First Week Game Plan

Do one small thing a day. By Friday, using Claude will feel normal.

- **Day 1:** Create your free account at claude.ai. Ask it to introduce itself and list 5 ways it can help your business.
- **Day 2:** Have it draft one real email you have been putting off.
- **Day 3:** Paste something long you need to read and ask for a 5-bullet summary.
- **Day 4:** Ask it to write 3 social media posts for your business.
- **Day 5:** Ask it to turn a messy process you do all the time into a step-by-step checklist.
- **Day 6:** Review the week. Which task saved you the most time? Do more of that.
- **Day 7:** Rest. You just added an assistant that never sleeps.

5 Mistakes Beginners Make

- **Being too vague.** "Write me something for my business" gets you generic fluff. Add details: who, what, and how long.
- **Trusting it blindly.** Claude is smart but it makes mistakes, especially with numbers, dates, and facts. Always review before anything goes public or to a customer.
- **Sharing sensitive information.** Never paste in Social Security numbers, bank logins, passwords, or customers' private data.
- **Giving up after one try.** If the first answer is off, reply with what to change: "shorter," "friendlier," "add a call to action." It learns from your feedback in the same chat.
- **Using it for tax or legal decisions.** Claude can organize your thoughts and draft documents, but it is not your tax pro or your lawyer. Confirm money and legal decisions with a licensed professional.

The golden rule: AI drafts, you decide. Let Claude do the heavy lifting, but you stay the boss of every word that leaves your business.

What Is Next?

You now know more than 90 percent of business owners about using AI. Here is how to keep going:

- **Save your best prompts.** When one works great, save it in a notes app so you can reuse it.
- **Teach it your voice.** Paste in something you wrote and say: "Write in this style from now on."
- **Give it one job a week.** Pick one repeating task each week and hand it to Claude. In two months, that is eight tasks off your plate.
- **Keep learning.** Look for the **30 Back-Office AI Prompts** pack and the **AI Efficiency Audit** worksheet, the companion pieces to this guide.

You did not get into business to drown in busywork.
Now you do not have to.

Please Read This

This guide is for **education only**. It teaches you how to use an AI tool. It is not tax advice, legal advice, or financial advice.

AI makes mistakes. Always review AI output carefully before using it in your business, especially anything with numbers, dates, customer communication, or legal language.

Never share sensitive personal or financial information with any AI tool.

Confirm all tax and legal decisions with a licensed professional.

Built for the entrepreneurs who do it all.

Truth Tax & Accounting