

THE SETUP GUIDE

15 Steps to Start Working with Claude

The Step-by-Step Setup Guide for
Freelancers, Creators, and Solopreneurs

Go from zero to a fully configured Claude setup.
No technical background needed. No coding.
Just follow the steps.

by [@theaitoolbase](#)

AI productivity tools for freelancers and creators

What's Inside

- 01 Download Claude and Get a Pro Plan
- 02 Use Cowork, Not Chat
- 03 Choose the Right Model
- 04 Set Up the Google Drive Connector
- 05 Let Claude Build Your Folder Structure
- 06 Create 3 Context Files
- 07 Write Your "About Me" File
- 08 Write Your "My Voice" File
- 09 Write Your "My Rules" File
- 10 Set Your Project Instructions
- 11 Stop Prompting — Start Clicking
- 12 Install Your First Plugins
- 13 Connect Your Tools
- 14 Install Useful Skills
- 15 Set Up Extensions
- ++ Bonus: Create Your Own Skills

How to use this guide

Follow the steps in order. Each builds on the previous one.

Total time: ~2 hours. Every step includes a clear action to complete before moving on.

Who This Guide Is For

You've heard about Claude. You've maybe even tried it once or twice. But you're still using it like a search engine — typing a question, getting an answer, closing the tab.

That's not how Claude works best. Not even close.

This guide is for freelancers, creators, and solopreneurs who want Claude to become a genuine working partner — not just another chatbot. Someone who knows your business, writes in your voice, and executes tasks while you focus on the work that actually matters.

The 15 steps in this guide will take you from zero to a fully configured Claude setup. No technical background needed. No coding. Just follow the steps in order, and by the end you'll have an AI assistant that knows who you are, what you do, and how you like things done.

Total setup time: about 2 hours.

Time saved per week after that: 5-15 hours.

Let's go.

Download Claude and Get a Pro Plan

2 min | Easy

Go to claude.ai/download and install the Claude desktop app. Then subscribe to the Pro plan at \$20/month.

Why the desktop app and not the website? Because the desktop app unlocks a fundamentally different experience. It can see your screen, read your local files, and stay in context across everything you do. The web version is a chatbot. The desktop app is a coworker.

Why Pro and not Free? The free plan is fine for casual questions. But you can't use Cowork mode (Step 2), you can't connect Google Drive (Step 4), and your usage limits are tight. Pro gives you roughly 5x the capacity, plus every feature in this guide.

Don't overthink this. It's \$20/month — less than most people spend on subscriptions they forget to cancel. And this one actually makes you money.

WHAT TO DO RIGHT NOW

1. Go to claude.ai/download
2. Install the desktop app for your operating system
3. Create an account (or log in)
4. Subscribe to Pro (\$20/month or \$17/month billed annually)

Use Cowork, Not Chat

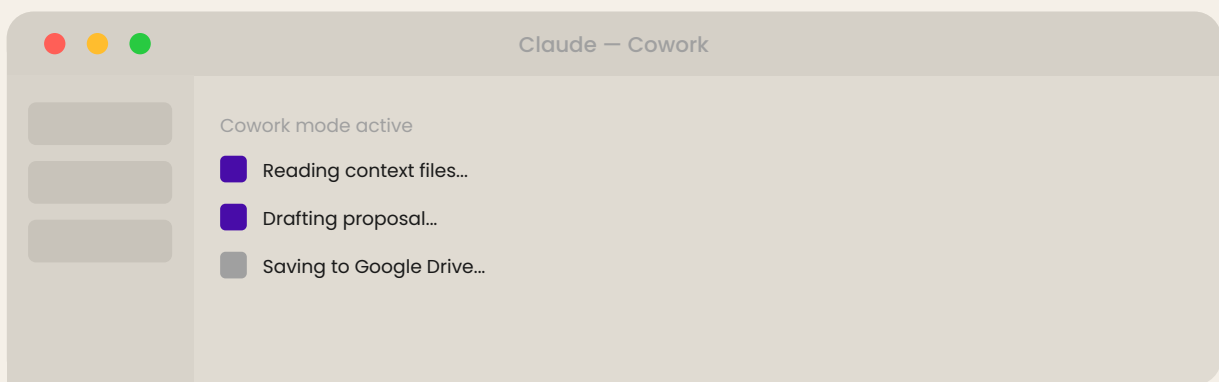
1 min | Easy

When you open the Claude desktop app, you'll see two modes: Chat and Cowork.

Chat is what you'd expect — you type, Claude responds. It's useful for quick questions, but it's limited. Chat doesn't read your files. It doesn't know your projects. Every conversation starts from scratch.

Cowork is where the magic happens.

In Cowork mode, you point Claude to a folder on your computer or Google Drive. Claude reads everything inside — your documents, your notes, your context files. It understands your business before you even ask your first question.



But Cowork goes further than just reading. It can:

- Write and save files directly to your folders
- Break complex tasks into subtasks and handle them systematically
- Use tools and connectors to interact with Google Drive, Canva, Slack, and more
- Show you its plan before executing, so you stay in control

From now on: Cowork for real work. Chat only for quick one-off questions.

Choose the Right Model

1 min | Easy

Claude isn't one model — it's three. Each one is built for different types of work. Using the wrong model means worse output and wasted tokens.



Sonnet 4.6 — Your Default Choice

This is the model you'll use 80% of the time. It's fast, smart, and efficient. Best for writing captions, drafting emails, creating content calendars, building templates, and any task that needs solid reasoning.

Opus 4.6 — The Deep Thinker

The most powerful model. It reasons deeper, catches nuances others miss, and excels at complex multi-step problems. Use for strategic planning, long-form writing, and high-stakes tasks. Turn on Extended Thinking for even better results.

Haiku 4.5 — The Speed Runner

The fastest and lightest model. Perfect for quick classifications, reformatting text, simple summaries, and repetitive tasks where speed matters more than depth.

Set Up the Google Drive Connector

5 min | Easy

You need a central place to store everything Claude works with. That place is Google Drive.

Why Google Drive and not a local folder?

- Access anywhere — laptop, phone, tablet. Your files follow you.
- Native Claude integration — Claude reads your docs directly inside the conversation.
- No sync headaches — one version of every file, always current.
- Collaboration-ready — share a folder when you hire a VA.
- Free storage — 15GB free with any Google account.

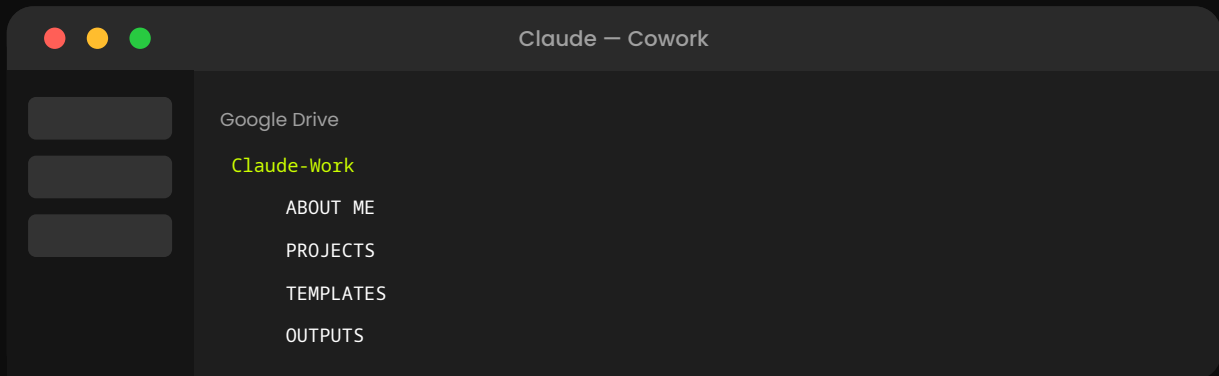
WHAT TO DO RIGHT NOW

1. Open the Claude desktop app in Cowork mode
2. Go to Settings Connectors
3. Find Google Drive and click Connect
4. Authorize Claude to access your Google Drive

Let Claude Build Your Folder Structure

3 min | Easy

Now that Google Drive is connected, you need a clean folder structure. Don't overthink it. Don't build it yourself. Let Claude do it.



ABOUT ME

Who you are and how you work. Claude reads this before every task.

PROJECTS

One subfolder per active project. Client work, products, content.

TEMPLATES

Your best past work, structured for reuse.

OUTPUTS

Where Claude saves all finished work. Your delivery folder.

"Create a folder called 'Claude-Work' in my Google Drive. Inside it, create 4 subfolders: 'ABOUT ME', 'PROJECTS', 'TEMPLATES', and 'OUTPUTS'. Confirm when done."

STEPS 6 - 9

Building Your Foundation

Create the three context files that make
Claude understand you, your voice, and your rules.

Create 3 Context Files

2 min | Easy

Inside your ABOUT ME folder, you need three files. These are the foundation of everything Claude does for you. Without them, Claude is guessing. With them, Claude knows exactly who you are, how you sound, and how you want things done.

1 `about-me.md`

What you do day-to-day. Your role, your business, your clients, your goals.

2 `my-voice.md`

Your tone and writing style. How you sound in emails, on social media, in proposals. Include 2-3 real writing samples.

3 `my-rules.md`

How Claude should work with you. Ask before starting? Show a plan first? Never delete files? Your operating rules.

You only set this up once. From that point forward, Claude reads these files before every task and adjusts its output to match you — not some generic template.

And here's the beautiful part: you don't have to write these files yourself. Steps 7, 8, and 9 show you exactly how to make Claude write them for you.

Write Your "About Me" File

10 min | Easy

Don't stare at a blank document trying to describe yourself. Let Claude interview you instead. Open Cowork and paste this prompt:

"I need you to write my about-me.md file — a context document that you'll read before every task to understand who I am and what I do.

Don't write it yet. First, ask me questions to gather the information you need. Ask about:

- What I do for work (freelancing, creating, consulting, etc.)
- Who my clients or audience are
- What my typical day-to-day tasks look like
- What tools and platforms I already use
- What my top 3 business priorities are right now
- What I'm building or working toward

Ask me these questions using multiple choice where possible so I can click my answers. Based on my answers, write a clean, structured about-me.md file and save it to my ABOUT ME folder in Google Drive.

Keep it under 400 words. No fluff. Just the facts Claude needs to help me effectively."

Claude will ask you a series of clickable questions. You answer by clicking. In about 5 minutes, you'll have a personalized context file that makes every future conversation dramatically better.

PRO TIP

Update this file every few months. Just tell Claude: "Read my about-me.md and ask me what's changed since you wrote it. Update the file."

Write Your "My Voice" File

10 min | Easy

This is the file that stops Claude from sounding like a robot. Without it, Claude writes in a generic, corporate tone. With it, Claude writes like you.

"I need you to write my my-voice.md file – a reference document that captures my writing style and tone. You'll read this before creating any content in my voice.

Don't write it yet. First, ask me questions to understand how I communicate. Ask about:

- Who I write for (my audience)
- How I'd describe my tone (casual, professional, energetic, calm, direct, etc.)
- Words or phrases I use often
- Words or phrases I never use
- Whether I use humor, and if so what kind
- How I feel about emojis, exclamation marks, and slang
- What kind of writing I admire

Then ask me to paste 2-3 real samples of my writing.

Based on all of this, write a structured my-voice.md file with clear guidelines Claude can follow. Save it to my ABOUT ME folder in Google Drive.

Format: voice characteristics, writing principles, what to avoid, and 2-3 sample snippets for reference."

This file is gold. Every email, every caption, every proposal Claude writes after this will sound like it came from you – because Claude studied how you actually communicate.

Write Your "My Rules" File

10 min | Easy

This file tells Claude how to work with you. Think of it as your operating manual for your AI assistant. Open Cowork and paste this prompt:

"I need you to write my my-rules.md file — a set of operating rules you'll follow when working with me across all projects.

Here are example rules (use as starting point):

Rule 1 — Ask Before Starting: If a request could go multiple directions, ask clarifying questions before executing.

Rule 2 — Evaluate the Prompt: Check if the prompt has a clear role, task, context, constraints, and output format.

Rule 3 — Show a Plan First: For anything substantial, show the plan and get approval before writing.

Rule 4 — Never Delete or Overwrite: New versions go alongside originals.

Rule 5 — Critique Before Creating: Flag weak angles or missing context before drafting.

Rule 6 — Score Finished Content: Rate every piece on audience fit, hook quality, and CTA clarity (1-10 each).

Ask me which rules I want to keep, modify, or remove. Then ask about additional rules — preferred file formats, response length, language preferences, etc.

Write the final my-rules.md and save it to my ABOUT ME folder."

Once this file exists, Claude stops being a generic assistant and starts being your assistant. It knows your standards, your preferences, and your dealbreakers.

Set Your Project Instructions

3 min | Easy

Project Instructions are persistent directions that Claude reads at the start of every Cowork session. You write them once, and they run forever.

This is where you tell Claude about your folder structure, where to save files, and what to read before starting any task.

WHAT TO DO RIGHT NOW

1. In the Claude desktop app, go to the project you're working in
2. Find Settings Edit Instructions (or the instructions panel)
3. Paste and customize the template below

"This project is for [YOUR PROJECT NAME], with the goal to [YOUR GOAL].

There are 4 subfolders in Google Drive under Claude-Work/:

1. ABOUT ME — who I am + how I write
2. PROJECTS — one subfolder per live project
3. TEMPLATES — my best past work as reference
4. OUTPUTS — where you save all finished files

Before starting any task, read all files in the ABOUT ME folder first.

Ask me questions before you execute. If something is unclear, ask again. Do not guess.

Save all finished work to: [YOUR OUTPUT FOLDER PATH]"

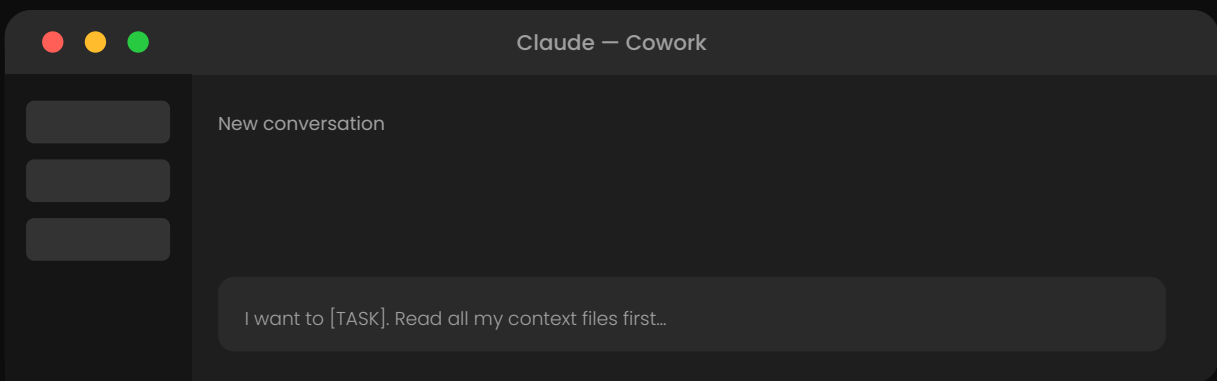
Customize the bracketed sections for your situation. Set it once. Forget about it. Claude remembers every time.

Stop Prompting — Start Clicking

0 min | Mindset shift

Here's the prompt that changes everything. Use this as your default for every task:

"I want to [TASK]. Read all my context files first.
Then ask me questions before you execute. Do not guess."



That's it. Replace [TASK] with whatever you need:

- "I want to write a proposal for a new client."
- "I want to plan my content for next week."
- "I want to create an email sequence for my new lead magnet."
- "I want to rewrite my website homepage."

You don't need to write perfect prompts. Claude forces clarity out of you through questions. That's the system. Better output in less time, every single time.

STEPS 12 - 15

Expanding Your Toolkit

Plugins, connectors, skills, and extensions that
turn Claude from an assistant into a production studio.

Install Your First Plugins

5 min | Easy

Plugins are packages that extend what Claude can do inside Cowork. Think of them like apps on your phone – you install the ones that match your work.

How to install:

1. Open Cowork
2. Go to Customize > Browse Plugins
3. Browse by category or search
4. Click Install

Recommended starter plugins:

Marketing

Plan campaigns, write content, review brand consistency, draft email sequences, and run SEO audits.

Data

Analyze spreadsheets, build dashboards, create visualizations. Perfect for tracking business metrics.

Sales

Research prospects, prep for calls, draft outreach emails, manage your pipeline.

Design

Get UX copy suggestions, design critiques, accessibility reviews, and handoff specs.

PDF Viewer

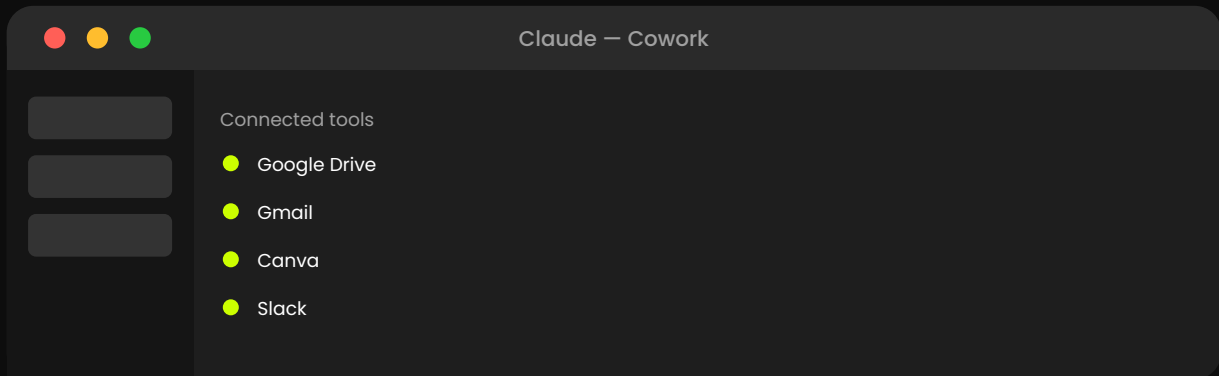
Open, annotate, fill forms, and sign PDFs directly in Claude.

STEP 13

Connect Your Tools

5 min | Easy

Connectors let Claude read and interact with the tools you already use — without copy-pasting between apps.



Available connectors include:

Google Drive	Read and write documents, spreadsheets, presentations
Email	Search emails, draft replies, create new emails
Google Calendar	Check your schedule, find availability
Canva	Create designs, edit templates, export graphics
Slack	Read channels, send messages, search conversations
Notion	Read and update your workspace

INSTEAD OF:

Open Drive find doc copy text paste into Claude get response copy back save...

YOU SAY:

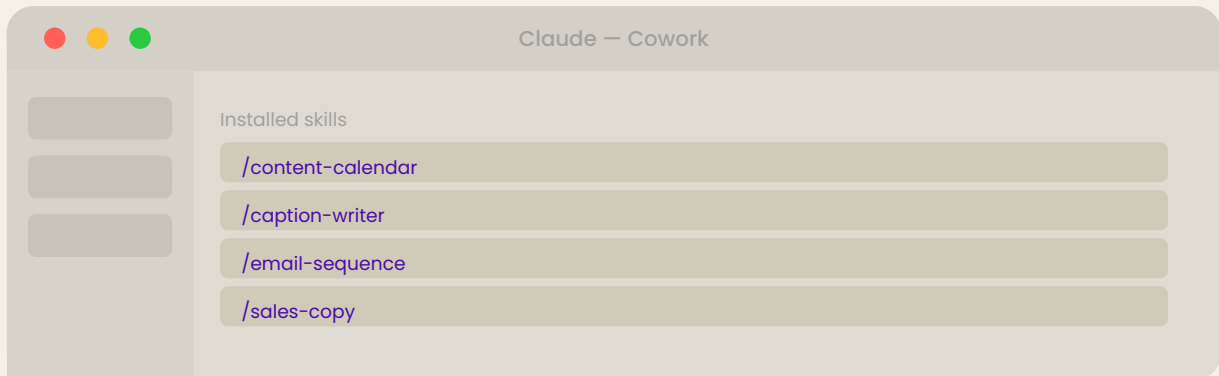
"Read the client brief in my Drive and draft a proposal. Save it to Outputs."

Claude does the rest. No tab-switching. No copy-pasting. No friction.

Install Useful Skills

5 min | Easy

Skills are specialized capabilities you can add to Claude. While plugins are broad toolkits, skills are focused – each one teaches Claude how to do one specific type of task exceptionally well.



Recommended skills:

Content Calendar Planner

Generates a full month of planned content with topics, formats, hooks, and posting schedule.

Caption Writer

Scroll-stopping social media captions with multiple variations, scored on hook quality and audience fit.

Email Sequence Writer

Full email sequences for lead magnets, product launches, or nurture campaigns.

Sales Copy Writer

Product descriptions, sales pages, and promotional copy for digital products.

Carousel Creator

Turns any topic into a structured carousel with hook slide, value slides, and CTA.

PDF Creator

Professional PDF documents – reports, guides, lead magnets.

The compound effect: With 5-6 skills installed, Claude becomes a one-stop production studio. Idea calendar captions carousel emails sales page.

Set Up Extensions

5 min | Easy

Extensions push Claude beyond your files and into your actual computer and browser.

Claude in Chrome

The Claude in Chrome extension lets Claude interact with web pages — reading content, filling forms, navigating sites, and extracting information.

- Research competitors by having Claude read and summarize their websites
- Fill out repetitive web forms automatically
- Extract data from web pages without manual copy-pasting
- Navigate web apps that don't have a Claude connector yet

Computer Use

Computer Use lets Claude see your screen and control your mouse and keyboard — like a remote assistant looking over your shoulder. Useful for native desktop apps and cross-app workflows.

Scheduled Tasks

Set Claude to run tasks automatically on a schedule — like a virtual assistant who shows up every day without being asked.

- "Every Monday, check my content calendar and remind me what to post."
- "Every Friday, compile my weekly metrics into a summary."
- "Every morning, scan my email for urgent client messages."

BONUS

Create Your Own Skills

You're not limited to pre-built skills. Claude lets you create custom skills tailored exactly to your workflow. A custom skill is a set of instructions that teaches Claude how to do a specific task the way you want it done — every time, without re-explaining.

Examples of custom skills freelancers and creators build:

Client Onboarding Skill

Claude asks the right questions, generates a project brief, creates the folder structure, and drafts the welcome email. All from a single trigger.

Invoice Generator

Claude pulls project details, calculates hours or deliverables, and creates a formatted invoice ready to send.

Content Repurposer

Feed Claude a blog post, and it generates an Instagram carousel, 3 tweet variations, a LinkedIn post, and an email newsletter version — all in your voice.

Weekly Review Skill

Claude scans your outputs folder, summarizes what you shipped, and flags what's still pending.

How to create your first skill:

Type `/skill-creator` in Cowork. Claude walks you through the entire process. You answer the questions. Claude builds the skill. From then on, you trigger it with a single command.

What Happens Next

You now have a fully configured Claude setup:

- The right plan and the right app (Steps 1-2)
- The right model for every task (Step 3)
- A connected, organized workspace (Steps 4-5)
- Context files that make Claude understand you (Steps 6-9)
- Persistent instructions that run automatically (Step 10)
- A workflow that makes prompting effortless (Step 11)
- Plugins, connectors, skills, and extensions (Steps 12-15)
- The ability to build your own custom skills (Bonus)

Most people never get past Step 1. They use Claude like Google — type a question, get an answer, leave.

You just built a system.

Every hour you invested in this setup pays dividends for months. Every task gets faster. Every output gets better. Every week, you reclaim hours that used to disappear into busywork.

The freelancers and creators who set this up now will have an unfair advantage over everyone who waits.

Now go build something.

Quick Reference Card

YOUR DEFAULT PROMPT

"I want to [TASK]. Read all my context files first. Then ask me questions before you execute. Do not guess."

WHICH MODEL TO USE

Model	When	Best for
Sonnet 4.6	80% of tasks	Writing, emails, content, brainstorming
Opus 4.6	High-stakes work	Strategy, analysis, sales pages, complex tasks
Haiku 4.5	Quick tasks	Reformatting, summaries, classifications

YOUR 3 CONTEXT FILES

about-me.md	Who you are, what you do, your goals
my-voice.md	Your tone, style, writing samples
my-rules.md	How Claude should work with you

YOUR FOLDER STRUCTURE

Claude-Work/	Root folder in Google Drive
ABOUT ME/	Context files (about-me, my-voice, my-rules)
PROJECTS/	One subfolder per active project
TEMPLATES/	Best past work for reference
OUTPUTS/	Where Claude saves finished work

RECOMMENDED STARTER PLUGINS

Marketing · Data · Sales · Design · PDF Viewer

KEY CONNECTORS

Google Drive · Gmail · Calendar · Canva · Slack · Notion

Your Setup Checklist

- Download the Claude desktop app Step 1
- Subscribe to the Pro plan (\$20/month) Step 2
- Switch to Cowork mode Step 3
- Set Sonnet 4.6 as your default model Step 4
- Connect Google Drive Step 5
- Create your Claude-Work folder structure Step 6
- Create about-me.md (let Claude interview you) Step 7
- Create my-voice.md (paste writing samples) Step 8
- Create my-rules.md (set your operating rules) Step 9
- Set your Project Instructions Step 10
- Start using the default prompt for every task Step 11
- Install 1-2 plugins that match your work Step 12
- Connect Gmail and Google Drive at minimum Step 13
- Install skills that match your workflow Step 14
- Set up Claude in Chrome + Scheduled Tasks Step 15
- Create your first custom skill with /skill-creator Bonus

Want more AI workflows?

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AI productivity tools for freelancers and creators who want to work smarter, not harder.