
Claude.ai Quick-Start Checklist

A companion to the “Beyond the Obvious” webinar — work through this at your own pace.

1. The Basics (if you're brand new)

- ☐ **Create a free Claude.ai account and send one test message**
Try something simple first, like asking it to draft a short email, so you get a feel for how it responds.
- ☐ **Practice writing one specific, detailed prompt**
Vague requests get vague answers. Compare “help with my email” vs. a request that names the goal, the audience, and the length you want.
- ☐ **Try the web search toggle for a current-events or up-to-date question**
Useful for anything that changes over time — pricing, news, current office holders — rather than settled facts.

2. Connect Your Accounts

- ☐ **Go to Settings → Connectors and connect Gmail**
Claude can read your inbox and draft replies. It will never send email on its own — you always review and hit send.
- ☐ **Connect Google Drive**
Lets Claude find, summarize, and compare your documents — and save files back to Drive.
- ☐ **Connect Google Calendar**
Full read/write — Claude can check your week and also create or move events for you.
- ☐ **Browse the Connectors Directory for one tool you use daily**
50+ integrations available, including Slack, Notion, Asana, and WordPress.

3. Try These Prompts This Week

- ☐ Run a morning inbox catch-up

TRY THIS PROMPT

"Scan my inbox for anything urgent from the last 48 hours and summarize it."

- ☐ Find who's waiting on you

TRY THIS PROMPT

"Find every email where someone is waiting on a reply from me, and list them by how long they've been waiting."

- ☐ Chain two or more connectors into one request

TRY THIS PROMPT

"Check my calendar for meetings this week, check Gmail for anything urgent, and pull my open action items from Drive — then give me a single priority list."

4. Build a System (Not Just an Answer)

- ☐ Set up one Claude Project for a task you repeat often

Add your style guide, templates, or reference files once. Every future request in that project already knows your voice and rules.

- ☐ Let Memory carry context forward

Claude can recall relevant details from past conversations, so you're not re-explaining who you are and what you're working on each time.

5. Stretch Goals

- ☐ Feed Claude a PDF or spreadsheet and ask it to pull only what you need

e.g., just the numbers, just the clauses, just the deadlines.

- ☐ Ask Claude to critique your writing, not just polish it

"Tell me where this argument is weak" surfaces things a compliment pass never will.

- ☐ Pick your one "this week" action and put a date next to it
