

Claude Code Setup Guide

Facilitated by Amanda Long · Smart Marketing Squad

Approximately 60 minutes



Hands-on — bring your laptop



Anthropic account required

BY THE END OF THIS SESSION YOU WILL HAVE

- ✓ Claude Code installed and running on your machine
- ✓ A personal CLAUDE.md that tells Claude who you are
- ✓ Five context files Claude references
- ✓ A completed first task that proves the whole thing works
- ✓ A clean folder structure for your AI work

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Accounts & Installation

Get your Anthropic account ready and install Claude Code

Create Your Anthropic Account 1A

1. Go to **claude.ai** and create an account if you don't have one
2. You'll need a **Pro or Team plan** to use Claude Code (\$20/month for Pro)
3. Log in and confirm your account is active before continuing

Download & Install the Claude Desktop App 1B

1. Go to **claude.ai/download**
2. Download the version for your operating system (Mac or Windows)
3. Open the installer and follow the prompts to install

4. Launch the Claude app — it will appear in your Applications folder (Mac) or Start menu (Windows)



On Mac: Drag Claude to your Applications folder if prompted, then open it from there.
On Windows: Run the installer as normal, then launch Claude from the Start menu.

Switch to Claude Code Inside the App ^{1c}

Claude Code is built into the desktop app — you switch to it at the top of the window.

1. Open the Claude desktop app and sign in with your Anthropic account
2. At the top, you'll see three options: **Chat**, **Cowork**, and **Code**
3. Click **Code** to switch to Claude Code mode
4. You're ready — all conversations in Code mode can read and write files and take action on your computer



Chat is the standard assistant. **Code** is the version that can take action on your computer — reading and writing files, creating folders, running tasks. Use **Code mode** for everything in this guide.

2 Understanding the Interface

What you're seeing and three rules for working with Claude Code

Open the Claude desktop app and start a new conversation.

WHAT YOU SEE	WHAT IT MEANS
Chat input box	Type your message here — just like any chat
Claude typing...	Claude is working
Tool calls (Bash, Read, Write...)	Claude is taking action on your computer
Approval prompts	Claude is asking your permission before doing something — always read these



Three rules for working with Claude Code:

1. Be specific — the more context you give, the better the output
2. You can stop Claude at any time by clicking the **Stop** button
3. Claude will ask before taking any irreversible action — always read those prompts

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Set Up Your CLAUDE.md File

The most important thing you'll create today

The `CLAUDE.md` file is a plain text file Claude reads at the start of **every session** — it tells Claude who you are, how you work, what tools you use, and what to never assume.

Think of it as onboarding a new employee. Every session, that employee reads their onboarding doc before starting work.

Let Claude interview you 3A

Instead of filling out a template yourself, Claude will interview you and build the file from your answers. In the Claude app (in **Code mode**), paste this prompt and send it:

PROMPT — SEND IN THE CLAUDE APP

I need to create my CLAUDE.md file – a personal context file that you'll read at the start of every session so you can work more effectively with me.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- Who I am: name, role, company, location, and the tools I use for email, calendar, project management, file storage, and communication
- How I work: my schedule and peak hours, how I like to receive information, how I make decisions, what communication style works best for me, and what I want you to never assume about me
- My role and responsibilities: what I actually do day to day and what outcomes I'm accountable for
- File preferences: where I want files saved by default, what formats I prefer, and anything I never want (e.g., no saving to Desktop)
- Task approach: how I want you to handle multi-step tasks, what to do when something fails, and when to ask vs. just proceed

After you've asked all your questions and I've answered them, do the following:

1. Generate my complete CLAUDE.md file with clear sections and concise bullet points
2. Create the folder ~/.claude/ if it doesn't exist
3. Save the file directly to ~/.claude/CLAUDE.md
4. Confirm when it's done

Start with your first question now.

Answer each question as Claude asks. When it's done interviewing you, it will write and save your CLAUDE.md automatically.

Review and test it 38

Once Claude confirms the file is saved, type:

PROMPT

What do you know about me?

Claude should summarize your CLAUDE.md back to you. If it does — your context file is working. If anything is missing or wrong, just tell Claude and ask it to update the file.

4 Build Your Context Files

Five files that tell Claude what you work on, not just how you work

While `CLAUDE.md` covers *how you work*, context files cover *what you work on*. For each file, use the provided prompt in Claude.ai or ChatGPT — it will interview you and generate a ready-to-save `.md` file.

Create the folder

In the Claude app, send this message:

PROMPT — SEND IN THE CLAUDE APP

Please create the folder ~/.claude/context/ if it doesn't exist.

1 Business Information

~/ .claude/context/business.md

Helps Claude understand your organization — what it does, who it serves, and what you're working toward.

PROMPT — PASTE INTO CLAUDE.AI OR CHATGPT

I need your help creating a business context file I'll use with Claude Code. This file will help my AI assistant understand my organization so it can give me better, more relevant responses.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- What the organization does and who it serves
- The size and structure of the organization
- Our primary goals and current priorities
- Key challenges we're navigating right now
- Any important context about our industry or competitive environment

After you've asked all your questions and I've answered them, generate a context .md file I can save directly. Format it with clear headings and concise bullet points. Do not include fluff — just the facts Claude needs to work effectively on my behalf.

Start with your first question now.

2 How I Work

~/ .claude/context/how-i-work.md

Captures your working style, schedule, decision-making patterns, and what energizes or drains you.

PROMPT — PASTE INTO CLAUDE.AI OR CHATGPT

I need your help creating a "how I work" context file for Claude Code. This file will help my AI assistant understand my working style, preferences, and patterns so it can support me more effectively.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- My daily schedule and peak productivity windows
- How I prefer to receive information (summaries vs. detail, bullets vs. paragraphs)

- How I make decisions and what slows me down
- My communication style and what frustrates me
- What energizes me vs. drains me at work
- Any quirks or patterns worth knowing

After you've asked all your questions and I've answered them, generate a context file in .md format I can save directly. Format it with clear headings and concise bullet points. Capture my actual patterns, not generic productivity advice.

Start with your first question now.

3 My Audience

~/ .claude/context/audience.md

Documents who you communicate with — customers, stakeholders, leadership, direct reports — and what works with each group.

PROMPT — PASTE INTO CLAUDE.AI OR CHATGPT

I need your help creating an audience context file for Claude Code. This file will help my AI assistant understand who I'm communicating with — whether customers, stakeholders, direct reports, leadership, or external partners — so it can help me communicate more effectively.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- Who my primary audiences are and what their roles are
- What they care about most and what they're trying to accomplish
- Their level of sophistication (technical knowledge, industry experience, etc.)
- Common objections, concerns, or resistance I encounter
- What communication formats and styles work best with them
- What I should never assume about them

After you've asked all your questions and I've answered them, generate a context file in .md format I can save directly. Use clear headings per audience segment if I have more than one. Concise bullet points only — no fluff.

Start with your first question now.

4 My Team

~/ .claude/context/team.md

Covers who you work with, how decisions get made, and how your team operates day to day.

PROMPT — PASTE INTO CLAUDE.AI OR CHATGPT

I need your help creating a team context file for Claude Code. This file will help my AI assistant understand who I work with so it can help me communicate, delegate, and collaborate more effectively.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- Who is on my immediate team and what each person owns
- How my team prefers to communicate and work
- Any contractors, vendors, or external partners I work with regularly
- How decisions get made on my team
- Any dynamics, strengths, or gaps worth knowing about
- How I like to manage and what my team needs from me

After you've asked all your questions and I've answered them, generate a context .md file I can save directly. Keep names and roles clear. Concise bullet points. No sensitive HR content — just working context.

Start with your first question now.

5 My Department

~/ .claude/context/department.md

Places your team in the broader org — priorities, metrics, cross-functional relationships, and constraints.

PROMPT — PASTE INTO CLAUDE.AI OR CHATGPT

I need your help creating a department context file for Claude Code. This will help my AI assistant understand where my team fits within the larger organization so it can give me more relevant, strategically aware support.

Please interview me by asking questions ONE AT A TIME. Cover these areas:

- What department or function I lead or belong to
- How my department fits into the broader org structure
- Our key metrics and how success is measured

- Our current priorities and initiatives
- How we interact with other departments (dependencies, handoffs, tensions)
- Budget, resource, or capacity constraints worth knowing

After you've asked all your questions and I've answered them, generate a `CLAUDE.md` file I can save directly. Focus on strategic and operational context. Concise bullet points. No org chart minutiae – just what Claude needs to understand where I operate.

Start with your first question now.

Link context files to your CLAUDE.md 4A

Once all five files are saved, add these lines to the bottom of your `CLAUDE.md` :

MARKDOWN — ADD TO BOTTOM OF CLAUDE.MD

Context Files

See `~/ .claude/context/business.md` for organization details.

See `~/ .claude/context/how-i-work.md` for my working style and preferences.

See `~/ .claude/context/audience.md` for audience details and communication guide.

See `~/ .claude/context/team.md` for team structure and working dynamics.

See `~/ .claude/context/department.md` for department priorities and org context.

5 Set Up Your Folder Structure

Give Claude a clean, consistent home for its output

In the Claude app, send this message:

PROMPT — SEND IN THE CLAUDE APP

Please create the following folders if they don't already exist:

- ~/Documents/1 Projects/clients
- ~/Documents/1 Projects/internal
- ~/Documents/1 Projects/experiments

Then add this to your **CLAUDE.md** under **File & Output Defaults**:

MARKDOWN

- Default save location: ~/Documents/1 Projects/
- Client work → clients/
- Internal tools/systems → internal/
- Experiments/tests → experiments/



Now Claude knows exactly where to put things — and you'll always know where to find them.

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Your First Real Task

Prove the whole setup works with something actually useful

Open a new conversation in the Claude app and choose the prompt that matches your role. Watch how Claude uses your context files to get the tone and audience right without you having to explain it.

Leadership / Strategy

Read my CLAUDE.md and context files.
Then help me draft a one-page briefing document summarizing our department's current priorities and top challenges. Format it for an executive audience. Save it to ~/Documents/1 Projects/internal/dept-briefing.md

Team Manager

Read my CLAUDE.md and context files.
Then create a simple weekly team check-in template I can reuse every Monday. Include sections for wins, blockers, priorities, and support needed from me. Save it to ~/Documents/1 Projects/internal/weekly-checkin.md

Communications / Stakeholders

Read my CLAUDE.md and context files.
Then draft a short stakeholder update email summarizing our team's progress this quarter. Use what you know about my audience to get the tone right.

Save it to ~/Documents/1 Projects/
internal/stakeholder-update.md



Review what Claude produces. Notice how it used your context. Adjust by responding with feedback — just like you would with a team member.

YOU'RE SET UP. NOW WHAT?

1. **Use Claude Code every day for at least one task** — even a small one. The habit is more important than the task.
2. **When something feels off, tell Claude and ask it to fix your CLAUDE.md** — don't go looking for the file yourself. Just say something like: *"That assumption was wrong — I actually use Outlook, not Gmail. Please update my CLAUDE.md so you don't make that mistake again."* Claude will make the fix for you. The more you correct it, the smarter it gets.
3. **Bring a real problem to your next session** — not a test task. A real deliverable, a real decision, a real document you need. That's when it clicks.

QUICK REFERENCE

ACTIONS

ACTION	HOW TO DO IT
Start a session	Open the Claude desktop app
New conversation	Click New Chat
Stop Claude mid-task	Click the Stop button
Update your CLAUDE.md	Tell Claude what's wrong and say: "Please update my CLAUDE.md to reflect this"

YOUR KEY FILES

~/**.claude/CLAUDE.md**

Your main context file

~/**.claude/context/**

Your five supporting context files

~/**Documents/1 Projects/**

Where Claude saves your work

ACTION	HOW TO DO IT
Find saved files	Check ~/Documents/1 Projects/

Guide created for AI Lab workshop sessions · Smart Marketing
Squad Questions after the session? hello@smartmarketingsquad.com