



FREE GUIDE

ChatGPT and Claude for business owners: the complete beginner guide

Last checked: 25 September 2026 · 22 minute read · For owners, no tech needed

INSIDE

1. Try this now: let it interview you
2. Start here if you've never used AI
3. Why it matters
4. ChatGPT or Claude: pick one and stop comparing
5. Getting set up, step by step
6. What to do when the answer is bad
7. Make it know your business (do this once)
8. Projects: one folder for each part of the business
9. Files, photos and voice
10. Using it across a team
11. More copy-paste prompts
12. Privacy: what not to paste
13. Worked examples
14. When it goes wrong: troubleshooting
15. Printable checklist
16. Quick reference

Joe | Droom

@joebuildswithai · droom.ca

The plan

1. Make a free account on ChatGPT or Claude (just one) and ask it three small questions today.
2. Spend 20 minutes telling it about your business, and save that so it remembers every time.
3. Give it one real, boring job a day for two weeks: an email, a reply to a complaint, a checklist. Keep doing the ones that save you time.

Try this now: let it interview you

Most bad answers come from a chatbot that knows nothing about your business. Paste this into a new chat on **chatgpt.com** or **claude.ai** and answer its questions one at a time.

COPY THIS

I want you to write a short brief about my business that I'll save as standing instructions for you. Interview me one question at a time: what we do, what we don't do, who our customers are, how I like to write, and what you should never do. After about 10 questions, write the brief in under 250 words, in plain sentences.

Save the brief it writes in the settings (section 6 shows where). Then start a new chat and ask: "Write a two-line reply to a customer asking if we're open Saturday." If it uses your real hours, it's working.

1. Start here if you've never used AI

If you've never opened ChatGPT or anything like it, this section is for you. It takes five minutes to read, and everything after it assumes only what's here.

What it is. ChatGPT and Claude are AI chatbots. A chatbot is a website or phone app where you type a message (or say it out loud) and it writes back, like texting a very fast assistant. ChatGPT is made by a company called OpenAI. Claude is made by a company called Anthropic. They do much the same job.

What "AI" means here. It means the tool has learned from a huge amount of written text how to read what you write and answer in normal sentences. You don't need to understand how. You need to know what it's good and bad at.

What it's good at:

- Writing a first draft: an email, a job ad, a notice for staff, a social post
- Rewording something you wrote so it's shorter, kinder or clearer
- Summarizing a long email or document into a few lines
- Turning messy notes into a tidy list or checklist
- Helping you think through a decision by asking you questions

What it's bad at:

- Knowing anything about your business that you haven't told it
- Being right every time. It can state something wrong in a completely confident voice. This is the most important thing to remember. Check every fact, number, date and name before you use what it wrote.
- Knowing what's happening today, unless it searches the web (it sometimes does, and usually tells you when)
- Judgement calls that need you: whether to fire someone, whether to take a job, what to charge

It's free to try. Both have a free plan. You don't need a credit card to start. The free plans limit how much you can use it in a day, which is fine while you're learning.

You can't break it. Nothing you type changes your computer, sends an email or spends money. It only writes words back to you in the chat. If an answer is bad, you ask again.

One rule from day one: don't type in private details about customers or staff (health information, account numbers, home addresses, anything confidential). Section 11 explains why and what to do instead.

Words you'll see

Word	What it means
Account	Your login (an email address and password) so the tool saves your chats and settings.
Chat	One conversation with the assistant. You can have many, each on its own topic.
Prompt	The message you type to the assistant. "Write a reply to this email" is a prompt.
Response	What the assistant writes back.
Custom instructions	A box in the settings where you describe yourself and your business once, so every new chat already knows it.
Memory	The assistant keeping useful facts from your past chats. It chooses what to keep; you can see and delete it.

Word	What it means
Project	A folder for chats about one topic, with its own instructions and files the assistant reads.
Upload / attach	Adding a file (a PDF, a photo, a spreadsheet) to your message so the assistant can read it.
Voice mode	Talking to the assistant out loud on your phone and hearing it answer.
Free plan / paid plan	Free has daily limits. Paid plans are a monthly subscription with higher limits and a few extra features.

2. Why it matters

Most owners who try ChatGPT or Claude open it once, type something like "write me a marketing plan", get a page of general advice, and close the tab. The tool wasn't the problem. It knew nothing about the business, so it wrote for an imaginary average company.

The owners who get real use out of it do three things differently. They tell it about the business once and save that, so they never have to explain again. They give it small, specific jobs instead of big vague ones. And they treat what comes back as a first draft from a quick new hire: useful, and always read before it goes anywhere.

What that buys you is time on the writing chores around the edges of the day. The reply to a tricky customer. The job ad you keep putting off. The procedure nobody ever wrote down. None of these needs you at your best. They need you to start, and an assistant makes starting quick.

This works whether you run a two-person shop or manage sixty people across three locations. In a bigger team the gain moves from "I write faster" to "everyone writes to the same standard", which section 9 covers.

3. ChatGPT or Claude: pick one and stop comparing

For everything in this guide, either will do. Trying both for weeks is how people end up using neither. Pick one today.

A few things that might tip it:

- If your office already runs on Microsoft 365 (Outlook, Word, Teams), you may already have Microsoft Copilot, which is Microsoft's assistant built into those programs. If you use Google Workspace

(Gmail, Google Docs), Google's assistant Gemini is built into those. Both work on the same ideas as this guide, so what you learn here carries over.

- They write a little differently. To my ear Claude's default style is a bit plainer and ChatGPT's a bit chattier, but taste varies. You can test this in five minutes (below).
- Both add features every few months. Don't choose on a feature list.

Try this now (5 minutes): Open both in two browser tabs (chatgpt.com and claude.ai). Paste the same request into each: "Write a short, friendly email to a customer telling them their order will be two days late because a supplier delivery was delayed. Under 80 words." Read both answers. Keep the one that sounds more like you. That's your tool.

4. Getting set up, step by step

On a computer

1. Open your web browser (Chrome, Edge, Safari or Firefox, whichever you use for email).
2. Type **chatgpt.com** or **claude.ai** into the address bar at the top and press Enter.
3. Click **Sign up**. Use your work email, or sign in with a Google or Microsoft account if it offers that. It will send you a code or a link by email to confirm it's you.
4. You'll land on a mostly empty screen with a message box at the bottom. The box usually has a greyed-out hint like "Ask anything" or "How can I help you today?"
5. Click in the box, type a question, and press **Enter** (or click the arrow button at the right of the box) to send it.

ChatGPT lets you try a few questions without an account, but you won't be able to save anything. Claude asks you to sign up first. Make the free account either way.

On a phone

1. Open the App Store (iPhone) or Google Play (Android).
2. Search for **ChatGPT** or **Claude**. Check the app is made by OpenAI or Anthropic, since there are copycat apps with similar names.
3. Install it, open it, and sign in with the same account you made on the computer. Your chats will appear on both.
4. The message box is at the bottom. There's also a microphone button so you can speak instead of type.

Finding your way around the screen

- **The message box** at the bottom is where you type.
- **The sidebar** (on the left on a computer; on a phone, tap the icon with two or three short lines in a top corner) lists your past chats. Click one to open it again.
- **New chat** starts a fresh conversation. On a computer it's near the top of the sidebar, sometimes shown as a pencil-and-paper icon. On a phone it's usually a pencil icon at the top. Start a new chat for each new topic.
- **Your name or picture**, usually bottom-left on a computer, opens the settings.
- Under each answer there's a small row of icons. One of them copies the whole answer so you can paste it into an email.

How to copy and paste

You'll use this more than anything else, so here it is step by step.

On a computer:

1. Put your mouse at the start of the text you want, hold the left button down, and drag to the end. The text turns highlighted.
2. Press **Ctrl + C** (on a Mac, **Command + C**) to copy.
3. Click where you want the text to go, such as the message box.
4. Press **Ctrl + V** (on a Mac, **Command + V**) to paste.

On a phone:

1. Press and hold your finger on a word until it turns highlighted and small handles appear.
2. Drag the handles to cover all the text you want.
3. Tap **Copy** in the little menu that pops up.
4. Go to the message box, press and hold inside it, and tap **Paste**.

To write a new line in the message box without sending, press **Shift + Enter** on a computer. On a phone, the return key usually just makes a new line and you tap the arrow to send.

How to fill in the [brackets]

Every prompt in this guide has parts in square brackets, like [your city]. After you paste a prompt, replace each bracket, including the brackets themselves, with your own details. So "I run a [type of business] in [city]" becomes "I run a hair salon in Kelowna". If you leave a bracket in, the assistant will guess what goes there, and it will guess wrong.

Try this now (3 minutes): Start a new chat and paste this, filling in the brackets:

COPY THIS

I run a [type of business] in [city] with [number] staff. Ask me five questions, one at a time, so you understand my business. Wait for my answer each time.

Answer its questions in plain words. You've just had your first real conversation with it.

5. What to do when the answer is bad

This is the step most beginners miss. When the first answer isn't right, you don't start over and you don't give up. You reply in the same chat and tell it what to change, the same way you'd tell a person.

Things you can type:

- "Shorter."
- "Less formal. It sounds like a bank."
- "Take out the second paragraph."
- "Don't apologize so much."
- "That's wrong: we're closed on Sundays. Fix it."
- "Write it again, as if you were talking to a regular customer you like."
- "Give me three different opening lines to choose from."

It remembers everything earlier in the same chat, so you don't need to paste the email again. Two or three short nudges usually get you there faster than trying to write one perfect prompt.

Before and after: a vague prompt versus a good one

The example answers below are illustrative, written to show the difference. Your results will vary.

The vague prompt:

COPY THIS

Write an email about the late order.

The kind of answer you get:

COPY THIS

Subject: Update Regarding Your Order

Dear Valued Customer, We hope this message finds you well. We wanted to reach out to inform you that there has been a delay with your order. We sincerely apologize for any inconvenience this may cause and appreciate your patience and understanding...

It's stiff, it doesn't say how late, and no real person talks like that.

The good prompt:

COPY THIS

Write a short email to a regular customer, Pat, whose order of six dining chairs will arrive on Thursday instead of Tuesday, because our supplier's truck was delayed. Say sorry once, give the new day, and offer to call if Thursday doesn't work. Friendly, plain words, under 80 words. Sign off as Sam.

The kind of answer you get:

COPY THIS

Hi Pat,

Sorry, your six dining chairs will now arrive Thursday rather than Tuesday. Our supplier's truck was held up, and it's out of our hands, but I wanted you to hear it from me first. If Thursday doesn't suit you, give me a call and we'll find a day that does.

Thanks for your patience, Sam

The difference came from four things in the prompt: who it's for, what exactly happened, what to say, and how long. Put those four in and most prompts improve straight away.

A fill-in template for any request

Copy this, fill it in, and use it for almost anything:

COPY THIS

Write a [email / text message / notice / list] for [who will read it]. The situation is: [what happened, in a sentence or two]. I want them to [what you want them to do or know]. Tone: [friendly / firm / formal]. Length: under [number] words. Don't [anything to avoid].

6. Make it know your business (do this once)

This step makes the biggest difference. Both tools have a place in the settings where you describe yourself once, and it reads that before every new chat.

In ChatGPT: click your name or picture (bottom-left on a computer; on a phone, open the sidebar and tap your name), then **Settings**, then **Personalization**. Look for **Custom instructions**. There's a box for what ChatGPT should know about you and how it should respond.

In Claude: click your name (bottom-left on a computer), then **Settings**. On the main settings page there's a box for your personal preferences, where you describe yourself and how you want Claude to answer.

Both also have **memory**, where the assistant keeps useful facts from your chats on its own. It's handy, but you don't decide exactly what it keeps. The custom instructions box is the part you control, so put the important things there. You can look at what memory has saved (in the same settings area) and delete anything wrong.

Your business brief, fill in the blanks

Copy this into the box and fill it in. Keep it under a page.

COPY THIS

My business: [Name], a [type of business] in [city or region], [number] staff. We do [main services]. We do NOT do [things people ask for that you don't offer].

Customers: Mostly [who: homeowners, small firms, patients, tenants]. They care about [speed, price, trust, clear answers].

How I write: Short, friendly, plain words. Canadian spelling. No exclamation marks. Sign off as [your name].

Rules: Never promise a date, price or outcome I haven't given you. If you need information I haven't given you, put it in [brackets] or ask me. Give me one draft, not five options, unless I ask.

The line about never promising a date or price matters more than it looks. Left alone, an assistant will happily write "we'll have that done by Friday" because it sounds polite.

If a blank box puts you off

Let it interview you instead. Start a new chat and paste:

COPY THIS

I want you to write a short brief about my business that I'll save as standing instructions for you. Interview me one question at a time: what we do, what we don't do, who our customers are, how I like to write, and what you should never do. After about 10 questions, write the brief in under 250 words, in plain sentences.

When it's done, copy the brief it wrote and paste it into the custom instructions or preferences box. Reread it after a month and fix whatever the assistant keeps getting wrong.

Try this now (5 minutes): After saving your brief, start a new chat and type only: "Write a two-line reply to a customer asking if we're open Saturday." If the answer uses your real hours, the brief is working. If it guesses, check your hours are in the brief.

7. Projects: one folder for each part of the business

A project is a folder inside ChatGPT or Claude. It holds its own instructions and its own files, and every chat you start inside it already knows that material. Both tools have projects, and both offer them on the free plan with limits on how many files you can add.

To make one:

1. In the sidebar, look for **Projects** and click **New project** (or the plus sign next to it).
2. Give it a plain name, like "Customer replies".
3. Find the project's instructions box and paste instructions for this area only, for example: "Draft replies in my voice using only the documents in this project. If the answer isn't in them, say so."
4. Add files: click to add files and choose documents from your computer (PDFs, Word files, text). On a phone this is often easier to do on a computer.
5. From now on, open the project first and start new chats from inside it.

Good projects for a small or medium business:

- **Customer replies.** Your refund policy, your service list, a few emails you were proud of.
- **Hiring.** Your job descriptions, your interview questions, a note on what a good hire looks like for you.
- **Procedures.** Opening and closing checklists, safety rules, the staff handbook.
- **Marketing.** Your service list, the areas you cover, a few past posts, and words you never want used.

Put a date in the name of anything that changes, like "Service list, Sept 2026". When it changes, delete the old file and add the new one, or the assistant may quote whichever it finds first.

8. Files, photos and voice

Attaching a file. In the message box there's a paperclip or plus button. Click it, choose a file, then type your question and send. Useful jobs:

- "Here's our supplier contract. List every date, notice period and penalty in a table."
- "Here's a customer's long complaint. Tell me in three lines what they actually want."
- "Here's last month's sales spreadsheet. Which five products sold least?" (Check the maths yourself. It's usually right on simple sums and sometimes wrong on messy spreadsheets.)

Photos. On your phone, tap the same plus or paperclip button and take a picture. A handwritten list becomes typed text. A whiteboard from a staff meeting becomes a list of actions. A photo of a broken part gets you a description you can send to a supplier.

Voice. Both phone apps have a voice mode: you tap a button near the message box (it looks like a sound wave or a microphone) and just talk. It talks back. This suits owners who spend the day on their feet. In the truck or on a walk, try: "Help me think through whether to hire a second person for the front desk." At the end, say "Write up what we decided as a short note," then copy that note somewhere you'll see it.

Try this now (5 minutes): Take a photo of any handwritten note or list on your desk. Attach it in a new chat and type: "Type this up neatly as a list." Check it got every word right.

9. Using it across a team

Once you use it well yourself, the next step is getting staff to use it the same way.

- **Write a one-page house rule.** What it's for, what it's not for, and what must never be pasted in (section 11). Put it at the top of every shared project and in the staff handbook.
- **Share projects instead of sending prompts around.** On the team and business plans, projects can be shared, so the whole front desk drafts replies from the same policy files and the same tone.
- **Keep one prompt list.** When someone finds a prompt that works, it goes in a shared document. Our other free guide has 30 to start with (comment PROMPTS).
- **Ask a keen staff member to be the go-to person.** One person who answers "how do I" questions saves everyone else from giving up.

10. More copy-paste prompts

Copy, fill every bracket, paste, and read the answer before using it.

Reply to a hard email

COPY THIS

Here is an email from a customer: [paste, with their name removed]. Draft a reply in my voice. Acknowledge the problem in one sentence, say what we will do and by when [fill in], and don't admit legal fault. Under 120 words.

Turn notes into a procedure

COPY THIS

Here are my rough notes on how we [open the shop / onboard a new client / close the month]: [paste]. Turn them into a numbered checklist a new staff member could follow on their first day. Flag any step that seems to be missing.

Explain a document

COPY THIS

I've attached a [lease / contract / insurance policy]. Explain it to me like a sensible friend: what I'm agreeing to, the dates that matter, what it costs me if I leave early, and three questions to ask before signing. You're not my lawyer, so point out anything I should check with one.

Think out loud

COPY THIS

I'm deciding whether to [hire another person / open Saturdays / drop a service]. Ask me questions one at a time until you understand the situation. Then lay out the case for and against in plain words, and tell me what information would settle it.

Make it sound like me

COPY THIS

Here are three emails I wrote that I'm happy with: [paste]. Describe my writing style in five short rules. Then rewrite this draft to follow them: [paste].

Meeting to actions

COPY THIS

Here are my notes from today's staff meeting: [paste]. List every decision and every action, with who owns it and by when. If an action has no owner, say so.

11. Privacy: what not to paste

Don't paste private customer or staff information into a personal AI account. That means health information, social insurance numbers, card or bank numbers, home addresses, anything under a client confidentiality duty, and personal details about employees. Clinics, law and accounting firms, and anyone else handling personal information have privacy duties under Canadian law, and a personal chat account isn't the place for that data.

What to do instead:

- **Take the details out.** Replace names with "Customer A" and remove addresses and account numbers, then paste. The assistant almost never needs to know who someone is to help you write to them.
- **Check the training setting.** On ChatGPT's personal plans, a setting called "Improve the model for everyone" is on unless you turn it off. It's in Settings, under Data controls. Claude has a similar switch called "Help improve Claude" in Settings, under Privacy. Turning these off stops your new chats being used to train future versions. It doesn't make it safe to paste sensitive data.
- **Use a temporary chat** for one-off questions you don't want saved in your history. ChatGPT calls it Temporary Chat, and Claude calls it an incognito chat. Both are started from the top of a new chat screen.
- **Look at a business plan** if staff will use it for real client work. Business and team plans come with different data terms and admin controls. Read the terms of the plan you choose, and in a regulated profession, check with your professional body or privacy adviser first.

A simple rule for staff: if you wouldn't read it out loud in a coffee shop, don't paste it.

12. Worked examples

These are made-up businesses, written to show the method. They aren't customers.

A physiotherapy clinic, 12 staff

The clinic manager has never used AI. She makes a free Claude account on a Monday and uses the interview prompt from section 6 to write her brief. She then makes a project called "Front desk" with the clinic hours, the three locations, the cancellation policy and the rule "never give medical advice; suggest booking an assessment". No patient information goes in.

When a front-desk staffer gets an email asking "Can you help with my shoulder, and do you direct bill?", they paste it with the name removed and get a draft that answers from the policy. The manager also asks it to rewrite the cancellation policy in plainer words for the website, then checks the new version against the original line by line.

A property management company, 40 staff

The operations lead uses ChatGPT's voice mode to talk through what happens when a tenant reports a leak, then asks it to "write that up as a numbered procedure with who does what." She edits two steps and it goes into the staff handbook. She does one procedure a week: move-ins, move-outs, after-hours emergencies. Within a couple of months, jobs that lived in three people's heads are written down.

She never pastes tenant names, unit numbers or lease terms. The procedures don't need them.

A family restaurant, 18 staff

The owner uses voice mode on the drive home: "Help me write a job ad for a line cook, weekends, we're a busy family place, I want someone reliable more than someone fancy." He answers its follow-up questions out loud, then asks for the ad in under 150 words and five interview questions. The first ad says "fast-paced environment", so he tells it: "Cut the clichés. Sound like a real person." The second one he posts.

13. When it goes wrong: troubleshooting

What happened	What to do
The answer sounds like a robot.	Paste three of your own emails and use the "make it sound like me" prompt. Add the rules it gives you to your custom instructions.
It made something up.	Give it the source (the policy, the price list) and add "Use only the information I gave you. If it's not there, say so."
The answer is generic.	Your prompt was too short. Add who it's for, what happened, what you want and how long. Use the template in section 5.

What happened	What to do
It promised a customer something.	Add "Never promise a date, price or outcome I haven't given you" to your custom instructions, and read every draft before sending.
It says you've reached your limit.	Free plans have daily limits. Wait a few hours, or switch to the other tool for the rest of the day.
It ignored your custom instructions.	Check you saved them. Start a new chat; changes apply to new chats.
It forgot what you said yesterday.	Each chat is separate. Put lasting facts in custom instructions or a project, not in an old chat.
The chat has gone off track.	Start a new chat. Long chats drift. Paste in only what matters.
It refuses to answer.	Reword the request and explain the business reason ("I'm writing a staff safety notice about..."). If it still won't, it's not the right tool for that job.
Staff all use it differently.	Give them a shared project with the instructions already set, and a one-page house rule.

14. Printable checklist

Week one

- ☐ Make a free account on one tool (chatgpt.com or claude.ai)
- ☐ Install the phone app and sign in
- ☐ Ask it three small questions
- ☐ Write and save your business brief in custom instructions or preferences
- ☐ Test the brief with the Saturday-hours question
- ☐ Turn off the training setting if you want to
- ☐ Use it for one real email

Week two

- ☐ Make one project for the chore you like least
- ☐ Add the files it needs (no private customer data)
- ☐ Use it once a day for a real job

- [] Try voice mode once on your phone
- [] Try attaching a photo or a document

Before you roll it out to staff

- [] Write the one-page house rule, including what never gets pasted
- [] Set up one shared project with instructions
- [] Start a shared prompt list
- [] Check the data terms of the plan you'll use

15. Quick reference

- A chatbot writes back when you type or talk. It's fast, useful, and sometimes confidently wrong.
- Choose one tool and stick with it for two weeks.
- Save a short business brief in custom instructions (ChatGPT) or preferences (Claude).
- Give each request who it's for, what happened, what you want and how long.
- If the answer is bad, tell it what to change in the same chat.
- Make a project for each area: customer replies, hiring, procedures, marketing.
- Use voice mode on your phone when you're away from a desk.
- Check every fact, date and number before anything leaves the building.
- Keep private customer and staff data out of personal accounts.

Want it set up for your business? [Book a free call](#)

droom.ca · joe@droom.ca · @joebuildswithai