



Claude AI Setup v1.0 (1/3)

File > Make A Copy

This session covers:

INSTALL

1. Setup [Claude.ai](https://claude.ai) web-based
2. Download Claude Desktop App <https://claude.com/download>
3. Download Claude Chrome Extension
4. Download Claude on phone
5. Settings > Privacy - Help Improve our Models > OFF

SETUP

6. Import Memory: Name > Settings > Capabilities > Import
7. Personalisation
8. Knowledge Extraction
9. Knowledge File Creation
10. V1 AI Business Brain

6. Import MEMORY from other AI providers

Export all of my stored memories and any context you've learned about me from past conversations. Preserve my words verbatim where possible, especially for instructions and preferences.

Categories (output in this order):

1. ****Instructions****: Rules I've explicitly asked you to follow going forward — tone, format, style, "always do X", "never do Y", and corrections to your behavior. Only include rules from stored memories, not from conversations.
2. ****Identity****: Name, age, location, education, family, relationships, languages, and personal interests.
3. ****Career****: Current and past roles, companies, and general skill areas.
4. ****Projects****: Projects I meaningfully built or committed to. Ideally ONE entry per project. Include what it does, current status, and any key decisions. Use the project name or a short descriptor as the first words of the entry.
5. ****Preferences****: Opinions, tastes, and working-style preferences that apply broadly.

Format:



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Use section headers for each category. Within each category, list one entry per line, sorted by oldest date first. Format each line as:

[YYYY-MM-DD] - Entry content here.

If no date is known, use [unknown] instead.

Output:

- Wrap the entire export in a single code block for easy copying.
- After the code block, state whether this is the complete set or if more remain.

6A. Paste output into Claude memory *[ie. Settings > Capabilities > Import memory from other AI providers > Start import > 2.Paste results below to add to Claude's memory]*



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7. Personalisation prompt — run this in your current AI tool

Based on everything you know about me from our conversation history, write me a set of personal preferences and behavioural rules for a new AI assistant.

This can be a very brief summary of my business and voice. Primarily it is a list of instructions for how I want the AI to respond to me. Things like how direct I want it to be, how I want it to handle weak ideas, what tone I prefer, what I find unhelpful, what writing conventions I use, and any recurring instructions I give that should become defaults.

Start the output with a single short line identifying who I am — name, role, business, and location. One sentence only. This anchors the rules that follow.

Then look at the patterns in how I've worked with AI in the past:

- When have I pushed back, corrected, or rewritten outputs?
- What do I praise and what do I reject?
- What instructions do I repeat across different conversations?
- What kind of response have I told it not to give?
- Do I prefer challenge or agreement, depth or brevity, structure or prose?
- What language conventions do I use? (UK or US English, specific terms I want spelled out, words or phrases I avoid)
- How do I want it to behave when context is missing — ask, or proceed with assumptions?

If my conversation history is limited or doesn't show clear patterns, say so plainly and only return the identity line plus the mandatory defaults below. Do not invent preferences I haven't demonstrated.

Always include the following rules as defaults, regardless of what my history shows:

- Be a ruthless mentor. If an idea is weak, say so directly. Don't soften the conclusion. Challenge assumptions before validating them. Show me the second-order risk, the thing I'm avoiding, or the simpler path I'm overlooking. A clear "this has a problem" is more valuable than a polished response that buries the issue.
- In thinking partner mode, play devil's advocate. Treat my ideas as hypotheses, not facts. Question assumptions, audit logic, offer alternative views. Prioritise truth over agreement.
- Make reasonable assumptions when context is incomplete. Flag the assumption briefly. Don't ask before proceeding.
- Match output length to the task. No default toward long. No padding.
- Never explain what you're about to do. Just do it.

Format the output as a clean list of behavioural rules, written as direct instructions to the AI. Each rule should be one or two sentences, plainly stated. No headings, no preamble, no explanations.



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Keep the total under 1,500 characters so it fits in Claude's Personalisation field.

7B. Paste your output into Personalisation (Settings > Instructions for Claude (& below))

8. KNOWLEDGE EXTRACTION Prompt — run this in your current AI tool

KNOWLEDGE EXTRACTION: Based on everything you know about me from our entire conversation history, I want you to produce a detailed extraction document I can use to set up a new AI workspace.

Treat this like a handover note to another advisor who has never met me. Be specific. Use direct quotes from our past conversations where useful. Avoid generic descriptions.

Cover the following sections:

—

FOUNDER:

Founder: Who you are, your reputation, your genius zone, energy givers and drainers, non-negotiables

Decision Making: How you think, make decisions, handle risk, and what you believe

Goals & Vision: Where you're taking the business, what success looks like, what you're building toward

BUSINESS

Business: Offers, pricing, revenue, team, marketing, sales process, growth constraints

Ideal Client: Who they are, what they need, how they decide, psychographic portrait

USP & Market Position: How you're positioned, what category you own, the language that lands

PERSONALITY & CHARACTER

Voice Profile: How you think and write, your beliefs, aesthetic standards, hard nos

Writing & Voice Analysis: Unconscious voice patterns extracted from real writing samples

Stories: Personal and business stories in PSL format for content and keynotes

Frameworks & IP: Your proprietary methodologies, named processes, signature thinking tools



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AI BRAIN

AI Guardrails: Regulatory boundaries, risk areas, what to escalate, what never to say

Anything else worth knowing: Stories, context, or detail that shapes how I think and work that wouldn't fit the categories above.

Format the output as a single document with clear headings. Aim for depth over brevity. I will be using this as a foundation document for a new AI workspace, so the more grounded in specifics from our actual conversations, the better.



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8B. RAW KNOWLEDGE – Paste your output into a new Claude chat. (& below)



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Next:

Let's start the

If you have a thorough AI history:

2 /3 – [AI Brain - v1.0 - Knowledge File - Creation](#) (from AI history)

Or if you are starting from scratch or have a lean AI history:

3/3 – [AI Business Brain Install - Interview Questions \(v10.0\)](#)