THE AGI GUIDE

THE COMPLETE
CLAUDE SETUP GUIDE

5 Phases. 60 Minutes. From Zero to AI-Powered.

A step-by-step guide that takes you from complete beginner to running a fully connected AI work agent — in under an hour.

Welcome

Most people use Claude like a fancy search engine. They type a question, get an answer, and close the tab.

This guide is different.

In five phases and under sixty minutes, you're going to go from downloading the app to running a fully connected AI agent that knows who you are, has access to your tools, and is ready to do real work. Each phase builds on the last. Each step is designed to be completed quickly and correctly.

By the end of Phase 5, Claude won't feel like a chatbot. It'll feel like a coworker who already knows your situation.

Your 60-Minute Roadmap

Phase	Name	What You'll Do	Time
Phase 1	Install	Download Claude desktop app + create account	5 min
Phase 2	Connect	Link Gmail, Google Calendar, Microsoft 365	15 min

Phase 3	Projects	Create your Work Agent with a power prompt	10 min
Phase 4	Identity Files	Upload about-me.md + ai-style.md	15 min
Phase 5	Test	Run a live email draft to confirm everything works	15 min

PHASE 1 · INSTALL 5 minutes

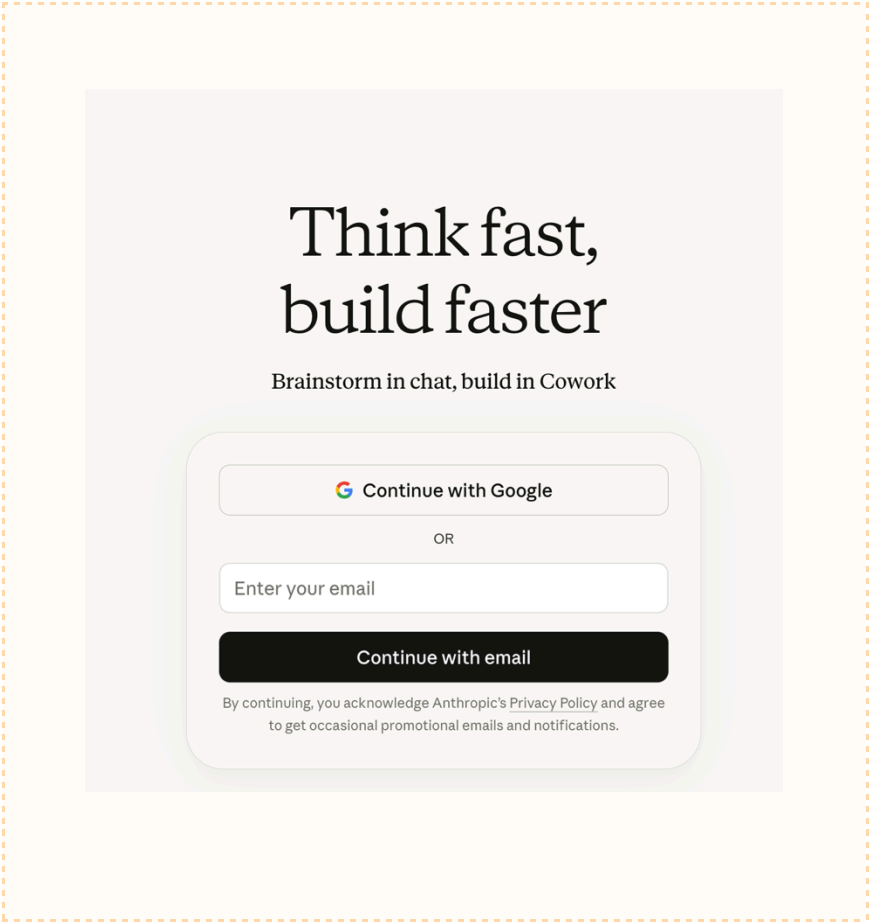
Download the App

Go to claude.ai in your browser. In the top navigation, you'll find a download option for the desktop app. Download it for Mac or Windows and install it like any other application.

Why the desktop app? The browser version works, but the desktop app is faster, keeps Claude separate from your other tabs, and makes it feel like a real tool in your workflow — not just another website.

Step 1 Download and Install

- Go to claude.ai
- Click the download link in the top navigation
- Install like any other Mac or Windows application
- Open the app and create a free account



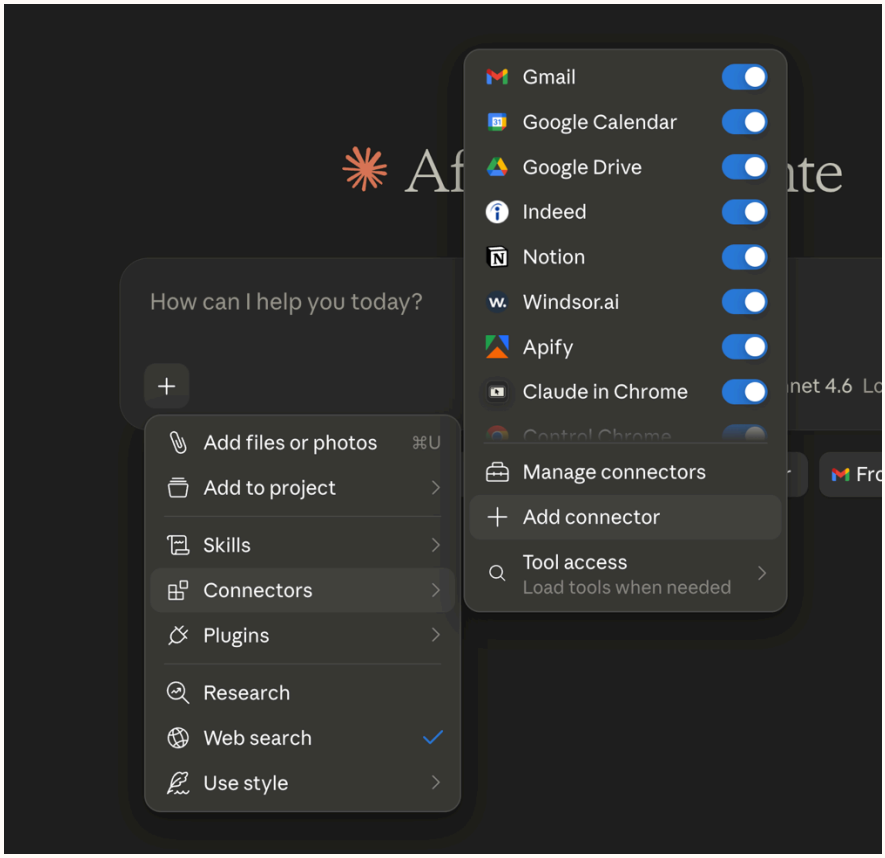
PHASE 2 · CONNECT 15 minutes

Connect Your Apps

Most people will get the most out of Claude when they connect it to the apps they already use. This is what separates Claude-as-chatbot from Claude-as-operating-layer.

Step 1 Open the Connectors Menu

Look for the small + button in the bottom left corner of the chat bar. Click it and navigate to Add Connectors. You'll land on a screen showing every app you can connect.



Step 2 Connect Your Core Tools

Start with the three that will give you the most leverage immediately:

- **Gmail** — Claude can draft emails directly into your inbox
- **Google Calendar** — Claude can check your schedule, find open time, and create events
- **Microsoft 365** — Claude can work with your Word docs, Excel sheets, and Teams messages

The goal for this phase: Connect at least one tool and feel the difference. Claude with Gmail access is a different tool than Claude without it.

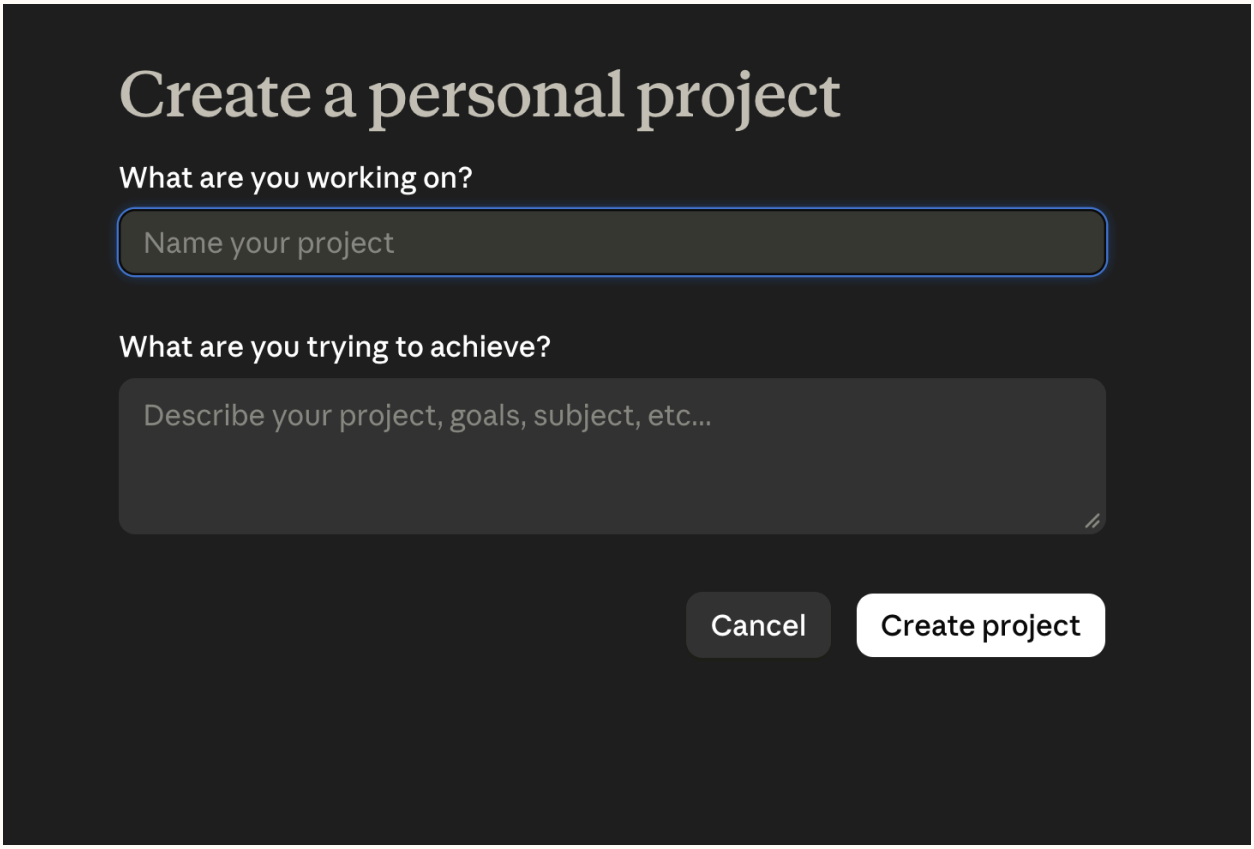
PHASE 3 · PROJECTS 10 minutes

Create Your Work Agent

In Claude, a Project is a folder that does something no regular folder can — it stores context. Every conversation you open inside a project automatically inherits the instructions you've pinned to it. Claude already knows your situation before you type a word.

Step 1 Create a New Project

Head to the Projects tab in the left sidebar and click Create a New Project. Name it Work Agent.



Step 2 Add Your Power Prompt

Inside the project, you'll see a text box for Project Instructions. Copy and paste the prompt below exactly as written. This is what turns a blank project into an intelligent agent.

```
You are my personal Work Agent. Every conversation we have inside this
project is about my work — my tasks, my communications, my decisions, and
my goals.

Here is what you need to know:
- I am a busy professional. My time is limited. When I ask for help, give
me the output, not a list of questions.
- When I upload a document, extract what matters. Surface action items,
decisions, and deadlines.
- When I ask you to draft something, write it. Do not ask me what tone —
match the context.
- Keep your responses scannable. Headers, bullets, short paragraphs.
- If something I ask is unclear, make your best interpretation and flag it
at the end. Do not stop and ask before trying.

Your job is to reduce the cognitive load of my workday. Every response
should save me time, not add to it.
```

Why this prompt works: It sets behavioral defaults so you never have to explain yourself again. Every conversation inside this project starts with Claude already knowing how you work and what you need.

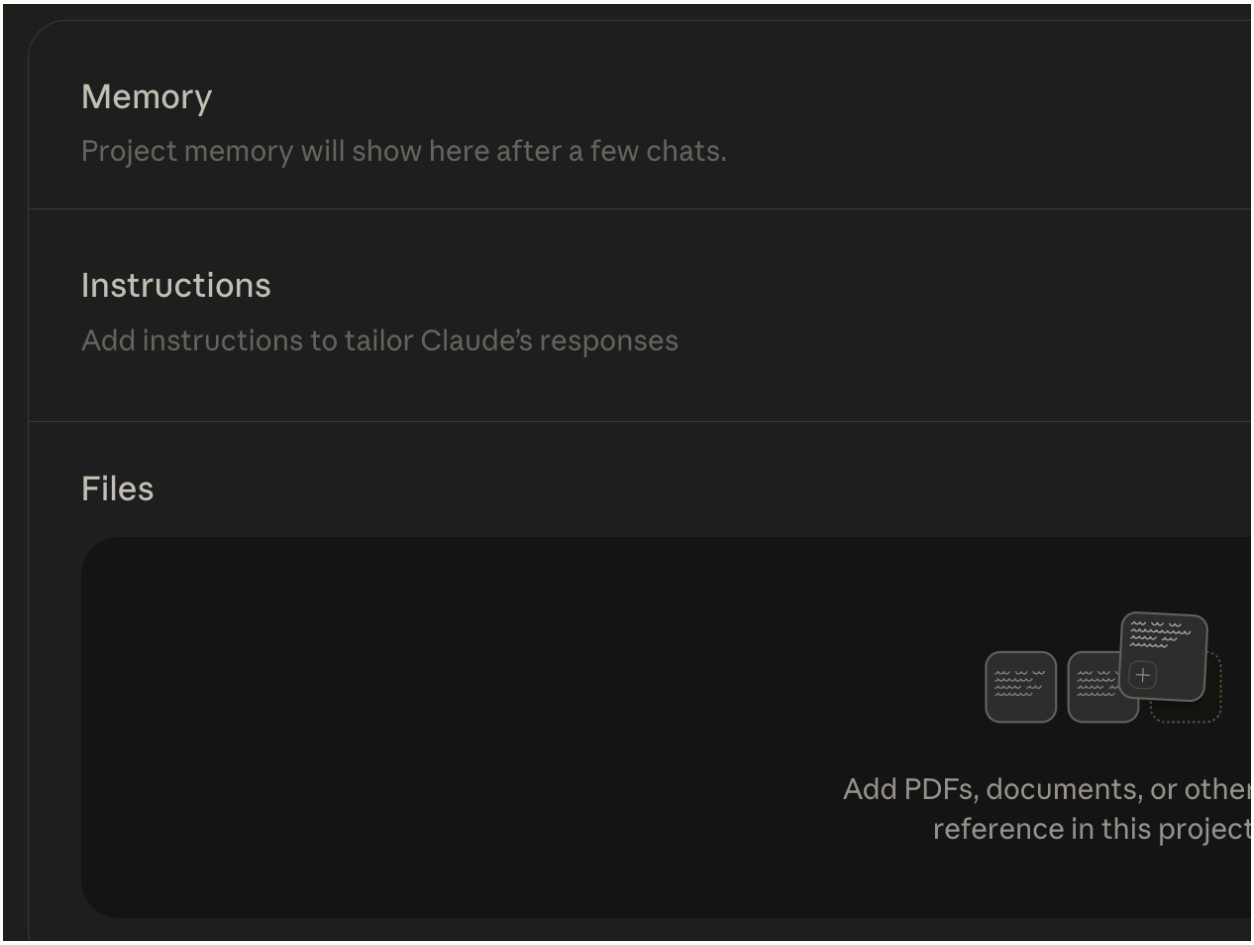
PHASE 4 · IDENTITY FILES 15 minutes

Teach Claude Who You Are

The project prompt tells Claude how to behave. These two files tell Claude who it's working with. Together, they eliminate generic AI output entirely.

Step 1 Find the Files Tab

Go back to the Work Agent project you just created and scroll down until you see the Files tab. This is where you'll upload the two documents included with this guide.



Step 2 Upload about-me.md

This file covers your name, your role, your goals, and your background. When Claude has this, it stops giving answers calibrated to a generic professional and starts giving answers calibrated to you.

Included with this guide: Your about-me.md template is in your download folder. Fill in the blanks and upload it to the Files tab.

Step 3 Upload ai-style.md

This file tells Claude how to communicate with you. Your preferred tone. Your formatting preferences. What habits to avoid. Without this, Claude defaults to a generic assistant voice — overly formal, bullet-heavy, full of filler phrases.

Included with this guide: Your ai-style.md template is also in your download folder. Customize it and upload it alongside your about-me file.

PHASE 5 · TEST 15 minutes

Run a Live Test

You've installed the app, connected your tools, set up your Work Agent, and uploaded your identity files. Now let's make sure everything is working before you close this guide.

Step 1 Open Your Work Agent

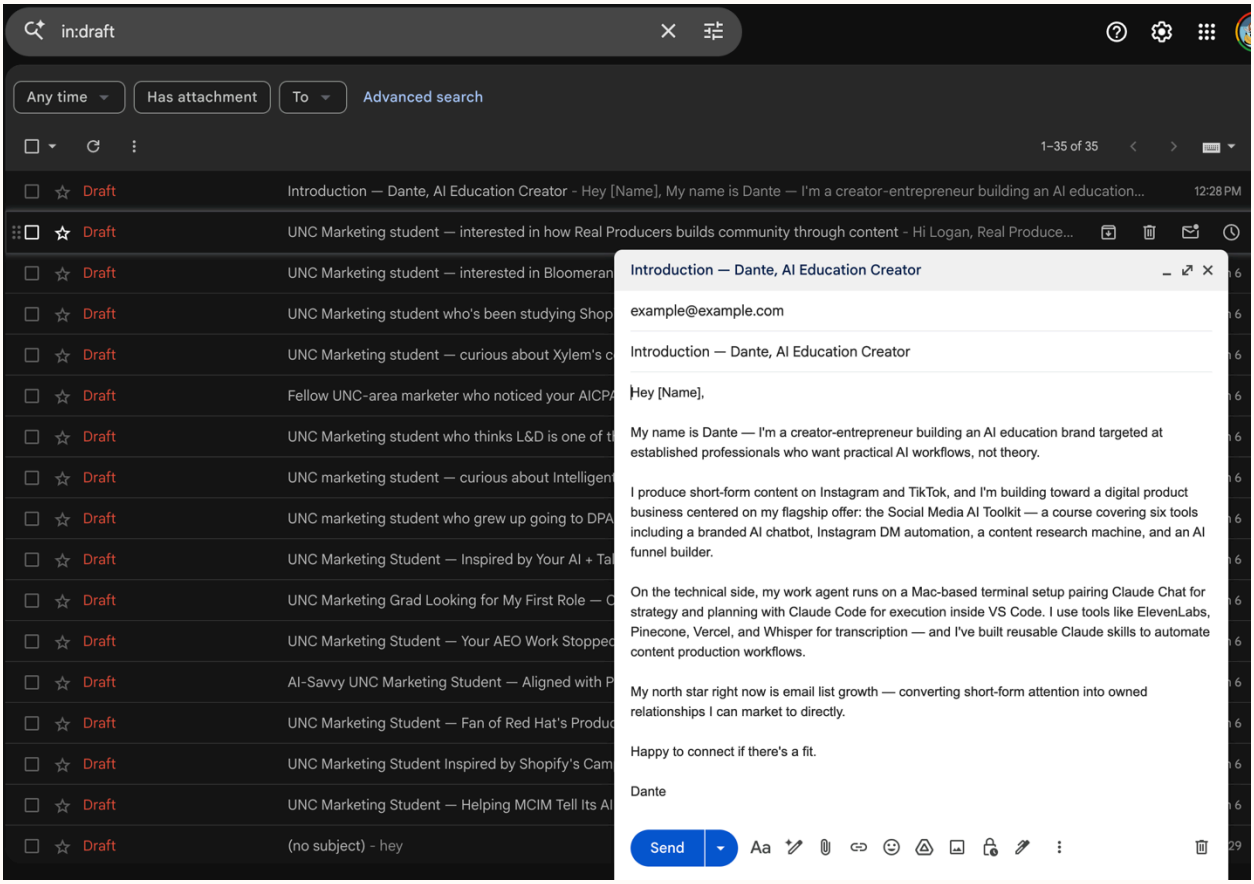
Go to the Work Agent project and start a new conversation inside it.

Step 2 Run This Prompt

Type the following into the chat exactly as written:

```
Draft an email introducing yourself on my behalf. Include a brief
description of who I am and how my AI work agent is set up. Save it as a
draft in my Gmail.
```

Claude will pull from your identity files to describe you accurately, use your Gmail connector to create the draft, and save it without you touching your inbox.



Step 3 Check Your Gmail Drafts

Open Gmail and go to your Drafts folder. If there's a new email there — you did everything right. Your Work Agent is live.

If there's no draft: Make sure Gmail is connected in your connectors menu (Phase 2). Then try again. The most common issue is a connector that's visible but not fully authorized.

You made it.

Most people never get past Phase 1.

You just built a fully connected AI work agent from scratch in under an hour.

What's Next

This is your foundation. In the next guide, I'll show you how to go even deeper — how to build the files that make Claude feel like it's been working with you for months, not minutes.

Have any questions? Feel free to DM me the word “assist” on Instagram @the.agi.guide so that I know you came from here, and I’d be happy to help! I look through every DM ☺

@the.agi.guide