TEMPLATE 01

about-me.md

Fill this out once. Pin it to every project. Claude will always know who you are.

How to use this template

Answer each question below as if you're briefing a new assistant on your first day working together. Be specific. The more honest and detailed your answers, the better Claude will understand you. Once filled out, copy the whole document and paste it into Claude's Project instructions under your About Me folder.

SECTION 1 — WHO YOU ARE

What is your name and what do you do?
Keep it simple. Your name, your job title or role, and one sentence about what your work actually involves day to day.

Your answer:

What industry or field are you in?
e.g. marketing, real estate, healthcare, education, finance, coaching, creative services...

Your answer:

How long have you been doing this work?
This helps Claude calibrate how much context to provide vs. how much to assume you already know.

Your answer:

SECTION 2 — YOUR GOALS

What are you trying to accomplish right now?
Think about the next 90 days. What's the main thing you're working toward — a launch, a project, a business goal, a personal milestone?

Your answer:

What does success look like for you?
Be specific. Not 'grow my business' — what does that actually mean in measurable terms?

Your answer:

What's the biggest thing slowing you down right now?
This helps Claude understand where to focus. What's the bottleneck — time, skills, knowledge, resources, clarity?

Your answer:

SECTION 3 — HOW YOU WORK

What tools do you use every day?
e.g. Google Docs, Notion, Slack, Excel, email, project management software. Claude can reference these when suggesting workflows.

Your answer:

Do you prefer to work alone or collaborate with a team?
Solo operator, small team, or large organization? This shapes how Claude frames advice and recommendations.

Your answer:

What time of day do you do your best thinking?
Optional, but useful if you want Claude to help you structure your day or schedule tasks.

Your answer:

SECTION 4 — BACKGROUND & CONTEXT

What's your relevant background or experience?
Degrees, certifications, past roles, skills — anything that gives Claude context about the lens you bring to your work.

Your answer:

Is there anything about your situation Claude should always be aware of?
e.g. I work with clients in a specific niche, I have a limited budget, I'm a solopreneur, I'm in a highly regulated industry...

Your answer:

What topics or areas are you most knowledgeable about?
This tells Claude where it can be brief and where it should explain more. If you're an expert in sales but new to AI, that matters.

Your answer:

SECTION 5 — HOW CLAUDE SHOULD TREAT YOU

How do you like information delivered to you?
e.g. give me the short version first then the detail, always give me your recommendation not a list of options, use examples, be direct...

Your answer:

What do you NOT want Claude to do?
e.g. don't over-explain things I already know, don't use formal language, don't add unnecessary disclaimers, don't hedge every answer...

Your answer:

Anything else Claude should know about you?
Open field. Add anything that would help Claude work with you better.

Your answer:

Note: Once you've filled this out, copy everything and paste it into the Claude Project instructions for your About Me folder. You can update it anytime as your situation changes.