A FREE GUIDE FROM CHANIKUL — AI CONSULTANT FOR SMBs

How to set up Claude for Small Business.

A plain-English playbook for owner-operators
who want AI working inside their business by lunchtime.
No coding. No consultants.

Chanikul Dechpholkrang
chanikul.com · linkedin.com/in/chanikul
Plymouth · Devon · Bangkok

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What's inside

A note before you start

If you run a 10–100-person business and you're still doing the quoting, the chasing, the reporting, and the admin yourself — this guide is for you.

Anthropic just released **Claude for Small Business**: a pre-packaged set of skills and connectors that plugs Claude into the tools you already use (QuickBooks, HubSpot, Stripe, Gmail, Google Calendar, Canva, Slack, Microsoft 365…). It is the first AI release I've seen that doesn't require you to be technical to get real value out of it.

You can have it installed and producing useful work in about an hour. I'll show you exactly how. Then I'll show you how to take it further than 99% of people who install it and walk away.

No fluff. No theory. Just the steps, in order, with the prompts you can copy.

— Chanikul

01

CHAPTER

What 'Claude for Small Business' actually is

In plain English: **Claude** is the AI assistant made by Anthropic. **Claude Desktop** (also called **Cowork**) is the app that lets Claude work *on your computer*, inside *your folders*, talking to *your tools*.

Claude for Small Business is a packaged 'plugin' inside Cowork that loads up Claude with:

- **Pre-built skills** for jobs every small business does — daily briefings, sales pulses, follow-up emails, content creation, contact lookups, Canva design.
- **Pre-wired connectors** for the apps small businesses actually run on — QuickBooks, HubSpot (or Attio, Pipedrive — it's flexible), Stripe, PayPal, Square, DocuSign, Microsoft 365, Gmail, Google Calendar, Google Drive, Canva, Slack.
- **Sensible defaults** for things like 'what's a qualified lead' and 'what counts as cash-position trouble' — defaults you'll tune in 5 minutes to match your business.

The point: you don't have to design an AI system from scratch. You install one plug-in, customise it once, and you have an assistant that knows what a small business *is*.

> ***Think of it as hiring a junior operations person on day one — except they already know your tools, work 24/7, never call in sick, and cost roughly £15–£100 a month depending on plan.***

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PRE-FLIGHT CHECK

What you'll need before you start

Tick these off and you'll be installed inside an hour.

- A **Mac or Windows PC** that you're willing to leave on (for scheduled work later — optional, but powerful)
- A **Claude account** — free works, **Pro at £15/month is what I recommend** to actually feel the difference, Max if you want to push it hard
- **30 minutes** of uninterrupted time
- Login details for the small-business tools you want connected (Gmail, calendar, QuickBooks etc.) — you don't need them all on day one
- A coffee. You'll be done before it goes cold.

You do **not** need:

✗ Any coding background

✗ A technical co-founder

✗ A consultant (yet — and if you ever do, you know where to find me)

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THE BASICS

Part 1 — The 30-minute install

Step 1 — Download Claude Desktop

Go to **claude.com/download** and download the Mac or Windows app. Drag it to Applications, open it, sign in. If you don't have a Pro plan yet, upgrade — it pays for itself the first time the assistant drafts an email you would have spent 10 minutes writing.

Step 2 — Open the Cowork tab

At the top you'll see **Chat / Cowork / Code**. Click **Cowork**. It'll ask you to select a folder — this is the assistant's workspace. Create a fresh folder somewhere obvious (Documents → "Claude Workspace") and select it.

> ***Important:*** *Claude can only see files inside the folder you select. Outside that folder, it's blind. This is a feature, not a bug — it's how you keep your private files private.*

Step 3 — Install the Small Business plugin

Click **Customize** in the top right. At the bottom, click **Browse plugins**. Find **Small Business** (or search for it). Click **Install**. Wait 10 seconds. Done.

Step 4 — See what just landed

Click **Manage** on the Small Business plugin and scroll through the skills it just gave you:

- **/business-pulse** — one-page cross-functional snapshot of cash, sales trends, what needs attention
- **/daily-briefing** — your morning agenda from calendar, inbox, CRM
- **/call-list** — who you need to follow up with today, ranked
- **/canva-creator** — on-brand marketing assets in Canva
- …and a stack more.

Read three skill descriptions so you know what's possible. That's it for now.

Step 5 — Click 'Customize'

This is the single most important button in the whole installation. Click it. Cowork will ask you a few questions about your business — what you do, who your customer is, which CRM you use, what counts as a qualified lead, what cash threshold you want to be alerted about. Answer honestly and briefly. Save the plugin.

You now have Claude for Small Business, customised, running on your machine. Total time: 20–30 minutes.

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THE BIT MOST PEOPLE SKIP

Part 2 — Customise it for YOUR business

> ***This is where 99% of people stop and never get the real value.*** *Out of the box, Claude is a smart generalist. If you skip this 20-minute setup, you'll be permanently re-explaining yourself every conversation.*

Step 1 — Write a claude.md file for your workspace

A **claude.md** is just a plain text file that lives in your workspace folder. Claude reads it at the start of every session. Think of it as the standing brief for a new assistant.

You can ask Claude to write it for you. Paste this prompt:

```
"I want you to create a claude.md file for my workspace. I'll tell you a few
things about me — please turn them into a clear, well-structured standing brief
that you'll read at the start of every session. I am [your name], I run
[business name], we do [one-line description of what you sell and to whom]. My
tone is [direct, warm, plain-English, etc.]. I prefer British spelling. Never
delete, send, or publish anything without checking with me first. If you spot a
better way of doing something, tell me. If you think I'm overcomplicating, push
back."
```

Claude will draft it. Read it. Edit anything that's wrong. Save.

Step 2 — Build an 'About Me' folder

Inside your workspace, create a folder called **about-me**. Drop three files inside:

- **about-me.md** — who you are, what the business does, customers, active projects, team, competitors, differentiators
- **writing-style.md** — how you want Claude to write in your voice; words to use, words to avoid
- **memory.md** — a running log Claude updates after each session. Stops the 'Claude forgot what we agreed' problem

Tell Claude in your **claude.md**: *"Always read all three files in **about-me/** at the start of every session. Always append new context to **memory.md** at the end of every meaningful session."*

Step 3 — Connect your actual tools

Go to **Customize** → **Connectors**. Connect in this order (each takes 60 seconds):

1. Gmail (or Outlook) — so it can read your inbox and draft replies
2. Google Calendar (or Outlook Calendar) — so it knows what's on today
3. Your CRM — HubSpot, Pipedrive, Attio, Folk, GHL, whatever you use
4. QuickBooks (or Xero) — so it can answer cash questions
5. Stripe / Square / PayPal — so it sees revenue
6. Google Drive (or OneDrive) — so it can read your docs
7. Slack — if your team lives there
8. Canva — for marketing assets
9. DocuSign — if you send contracts

> ***Permissions transfer.*** *Claude inherits whatever permissions you have in each tool. If a junior staff member is view-only in QuickBooks, Claude (on their behalf) inherits the same restriction. Nothing leaks sideways.*

Step 4 — Test it

Open a new task in Cowork and type:

```
"Check my inbox and my calendar for tomorrow. Tell me anything important, and
draft replies to anything urgent. Don't send anything — just leave the drafts."
```

What you should see:

✓ Claude reads the claude.md

✓ Claude opens calendar, opens Gmail

✓ Claude returns a clean one-page briefing

✓ Drafts sit in your Gmail drafts folder ready to review

If that worked: you now have an AI assistant that *actually knows your business*. You are already further along than most people who'll ever install this thing.

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WHERE THE TIME LEVERAGE STARTS

Part 3 — Five workflows worth automating in week one

These are the five things I see SMB owners win the fastest on, in the order I'd tackle them. Each gets: what it does, who it's for, the prompt to copy, and what to watch for.

WORKFLOW 1

The morning briefing

What it does. Every morning, Claude reads your calendar, inbox, and CRM, and gives you a one-page brief on what matters today — meetings, follow-ups, deals at risk, anything that needs your attention.

Who it's for. Every owner-operator who currently starts their day in their inbox.

Prompt:

```
"Give me my morning briefing. Read my calendar for today and tomorrow, my unread
emails, and any deals in my CRM marked 'hot' or 'last activity > 7 days'. Output
a one-page brief in this order: (1) top 3 priorities today (2) meetings with
prep notes (3) emails I must reply to today, with draft replies ready (4) deals
at risk (5) anything else worth flagging. Keep it under 400 words."
```

Watch for. First time it runs, it may over-flag. Tell it what's noise vs. signal and it'll learn. Update your memory.md with the rules.

Power move. Once it's good, schedule it (see Part 5) to run at 7am every weekday and email you the result.

WORKFLOW 2

The follow-up engine

What it does. Drafts personalised follow-up emails to leads, prospects, and customers who've gone quiet — without ever sending one without your approval.

Who it's for. Anyone with a sales pipeline where leads are slipping because nobody has time to chase.

Prompt:

```
"Look at my CRM. Find every contact whose last activity was 7+ days ago and
whose deal stage is 'discovery', 'proposal', or 'negotiation'. For each one,
draft a short, human-sounding follow-up email that references the last
conversation we had (read the notes in the CRM for context). Put each draft in
my Gmail drafts folder, do not send. Output a list of who you drafted to and the
angle you used."
```

Watch for. Claude is good at sounding human but can occasionally sound too polished. Tell it your style ("short, casual, lowercase first word, no exclamation marks") in your writing-style.md.

Power move. Schedule weekly. Wake up Monday with 15 reviewed-and-ready follow-ups instead of zero.

WORKFLOW 3

The cash-position scan

What it does. Tells you where your money is, what's coming in, what's overdue, and what's at risk — in plain English, no spreadsheet required.

Who it's for. Owners who feel the cash anxiety on Sunday nights but never quite have time to dig in.

Prompt:

```
"Read my QuickBooks. Tell me: (1) cash on hand right now (2) money expected in
the next 30 days from invoices already issued (3) any invoices overdue 30+ days,
grouped by customer with amounts (4) recurring costs landing in the next 30 days
(5) projected cash position at day 30 and day 60. Plain English, no jargon. Flag
anything I should be worried about."
```

Watch for. First time, double-check against QuickBooks yourself. Once you trust it, run it weekly.

Power move. Chain it: '…and for any invoice 30+ days overdue, draft a polite chase email to put in my Gmail drafts.'

WORKFLOW 4

The content engine

What it does. Turns one idea into a week of marketing content — LinkedIn post, Instagram caption, email newsletter draft, Canva graphic — in your voice.

Who it's for. Owners who know they should be posting but never sit down to do it.

Prompt:

```
"I want to publish content this week about [topic]. Read my writing-style.md
first. Then give me: (1) one LinkedIn post, 200 words max, hook on line 1 (2)
one Instagram caption, 150 words max (3) one short email to my list, 250 words,
with a subject line (4) a Canva brief I can paste in for a square graphic. All
four pieces should hang together on the same idea but be written for the
platform."
```

Watch for. First outputs sound generic until you've fed it real writing-style.md rules. Be brutal in editing the style file — that's the lever.

Power move. Once it's writing in your voice, run weekly. Four weeks of content drafted in 20 minutes.

WORKFLOW 5

The proposal builder

What it does. Turns a discovery-call recording or notes into a clean, formatted proposal you can send.

Who it's for. Service businesses (consultants, agencies, trades, professional services) who lose deals because the proposal takes 3 days to write.

Prompt:

```
"I just had a discovery call with [Client Name]. Here are my notes: [paste].
Build a proposal as a Word document with these sections: (1) Their situation in
their own words (2) What they want to achieve (3) What I'm proposing (scope,
deliverables, timeline) (4) Investment options — three tiers if it makes sense
(5) Next steps. Use my standard pricing from pricing.md. Match my writing style.
Save in outputs/proposals/[ClientName]/."
```

Watch for. Always read the output before sending. Claude can occasionally invent a deliverable you don't offer — your pricing.md is the guardrail.

Power move. Build a proposal-template.md in your workspace so every proposal has consistent structure and tone.

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WHAT EVERY OWNER ASKS FIRST

Part 4 — Safety, permissions, and the data question

What Anthropic does and doesn't do

- **Anthropic does not train Claude on your business data.** Stated in their terms, confirmed in privacy settings. Turn off 'help improve Claude' in Settings → Privacy for extra peace of mind.
- **Your existing tool permissions still apply.** Junior staff member can't see the bank balance in QuickBooks? Neither can Claude when acting for them.
- **Claude doesn't run autonomously by default.** It drafts, suggests, surfaces — you approve before anything is sent, published, paid, or filed.

What you should do

- Always review drafts before sending — especially in the first month.
- Don't connect your business banking (QuickBooks/Stripe data is enough).
- Restrict access by folder. Cowork can only see the folder you point it at.
- Be deliberate about which tools you connect. You don't need them all on day one.
- For team accounts, decide who can install plugins and connect tools.

What this is *not* (yet)

It's not a replacement for your team. It's not running your business autonomously. It's not making big decisions for you. **It's a very capable junior operator** — and that's exactly the right framing for 2026. Don't oversell it to yourself, and you won't be disappointed.

07

THE 7-STEP LEVEL-UP

Part 5 — Power-user setup

*Adapted with credit from Simon at **Better Creating**'s excellent video 'Set Up Claude Cowork better than 99% of people' — go subscribe to him for the deeper Cowork content. I've compressed his 7 steps into a checklist tuned for small business owners.*

By now you have Claude for Small Business installed, customised, and connected. This section is for when you're ready to push it from 'useful assistant' to **always-on operations sidekick.**

Step 1 — Pick the right model

Switch model in Cowork settings. **Sonnet** for daily work, briefings, follow-ups, scheduled tasks. **Opus** for high-stakes thinking — proposals, financial analysis, anything you'd previously have given to a strategist. Turn on **extended thinking** for Opus.

Step 2 — Set global instructions

Settings → Cowork → Global Instructions. Your top-level claude.md, applied everywhere. Put your non-negotiables here: who you are, how to talk to you, safety rules, always read about-me/ at session start, always log to memory.md at session end. Set once, rarely touch again.

Step 3 — Build out about-me properly

At power-user level, your about-me/ folder contains: about-me.md, writing-style.md, memory.md, customers.md (top 20 accounts), team.md (your people), context-map.md (where stuff lives).

Step 4 — Add connectors thoughtfully

Power-user additions: **Claude in Chrome** (browses the web for you), **Notion / your knowledge base**, **Make / Zapier** (trigger existing automations).

Step 5 — Use built-in skills + add plugins

Beyond Small Business, useful plugins: **Legal** (triage NDAs, draft responses), **Marketing** (campaign briefs, SEO audits), **Customer Support** (triage inbound), **Specialist Sub-Agent Builder** (build your own AI specialists). You only need 2–3. Don't install everything.

Step 6 — Folder structure for scale

Workspace structure: claude.md, about-me/, projects/ (one folder per active project with its own claude.md), outputs/, templates/, plugins/. Tell Claude in global instructions: "All generated outputs go into outputs/[project-name]/. All new projects get their own folder under projects/ with their own claude.md and memory.md."

Step 7 — Schedule the boring work

Settings → Scheduled Tasks → New Task. Run things unattended on a schedule. Examples: **Daily 7am** morning briefing emailed to you · **Daily 6pm** end-of-day log · **Weekly Monday 8am** pipeline review with follow-up drafts ready · **Weekly Friday 4pm** invoice chase drafts · **Monthly 1st** performance report. Requires your computer to be on with Cowork running — a small always-on desktop (Mac Mini) is ideal.

08

AVOID THESE

Common mistakes I see on every audit

Mistake 1 — Installing everything, customising nothing.

The plugins are powerful *if you tune them*. People who skip the about-me/ setup never get the magic. They use Claude like Google with extra steps.

Mistake 2 — Asking for moonshots before mastering basics.

Don't try to 'automate the whole business' in week one. Pick *one* workflow, get it bulletproof, then add the next. Compounding comes from stacking small reliable wins.

Mistake 3 — Treating Claude like a robot, not a colleague.

The owners who get the most out of it talk to Claude like a smart junior employee — with context, with feedback, with corrections. One-line commands get one-line value.

Mistake 4 — Connecting tools without thinking about permissions.

Spend 60 seconds per connector reading what you're agreeing to. You'll catch the one that wanted broader access than you intended.

Mistake 5 — Skipping memory.md.

Without it, every conversation starts from zero. With it, every conversation builds on the last. This single file is the difference between a chatbot and an assistant.

Mistake 6 — Not scheduling anything.

Scheduled tasks turn Claude from a tool you open into a system that runs. Even one scheduled morning briefing changes the texture of your week.

09

YOUR 4-WEEK RAMP

What to do next

If you got through this guide and installed it, you've now done more with AI than 95% of small business owners in the UK. Congratulations.

Here's what I'd do next, in order:

1. **This week** — finish install + customisation + connect Gmail, Calendar, CRM. Run the morning briefing prompt every day for 5 working days.
2. **Next week** — add the follow-up engine and the cash-position scan. Schedule the morning briefing.
3. **Week 3** — add the content engine. Push your writing-style.md until outputs sound like you.
4. **Week 4** — pick *one* workflow you do manually every week that you hate. Design a Claude version of it. That's where the real time leverage starts.

> ***If you'd like me to do this with you:*** *I run paid AI audits for owner-operated SMBs (£5k–£15k). In 1–2 weeks I sit with you and your team, map the workflows you're losing time on, quantify the £ leakage, and hand you a prioritised AI roadmap with quick wins and big swings. Most audits pay for themselves inside 90 days.*
>
> *Book a free 30-minute discovery call at **chanikul.com**.*

If not — keep the guide, share it with another owner who'd benefit, and feel free to tag me on LinkedIn when something breaks (or works) so I can help.

Either way: build the assistant. The owners who do this in 2026 are going to spend the next five years running circles around the ones who don't.

Good luck.

— Chanikul

chanikul.com · linkedin.com/in/chanikul

ABOUT THE AUTHOR

Who wrote this

I'm Chanikul Dechpholkrang, a one-person AI consulting practice based in Plymouth, UK and Bangkok, Thailand. I help owner-operated SMBs diagnose expensive manual workflows and replace them with AI that actually works — usually with a payback period under 12 months.

I'm a Marketing graduate (Bangkok), a Master's in Digital Effects (Bournemouth), 10 years in London's creative industry, and now an AI builder who can both run the strategic conversation with a 60-year-old founder *and* ship the working solution myself in Claude Code. That combination — strategy + build + cross-industry pattern recognition across healthcare, fintech, content automation, education, events — is rare, and it's what I bring to every audit.

If your business is bleeding hours on quoting, follow-up, reporting, or admin, we should talk.

chanikul.com · **linkedin.com/in/chanikul**

CREDITS & FURTHER READING

- *How to setup Claude for Small Business* — the original product walkthrough that inspired the install steps in Part 1.
- *Set Up Claude Cowork better than 99% of people* by Simon at **Better Creating** — source for the 7-step power-user framework in Part 5. Go watch his channel.
- **Anthropic** — for shipping a product that finally makes AI accessible to non-technical owners.

This guide is free. Share it. Print it. Hand it to a peer. Just leave the attribution intact.

READY FOR THE NEXT STEP?

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Plymouth & Devon · Bangkok · Remote UK & International
linkedin.com/in/chanikul