

# Claude Project Setup Sheet

Set up a reusable workspace where Claude already knows your role, context, and files. Four steps, about fifteen minutes. Every detail matches Anthropic's own docs (linked at the bottom).

## The four steps

### 1. Create the project

Go to [claude.ai/projects](https://claude.ai/projects) and click "+ New Project". Name it and add a short description (just for you; Claude does not read these).

### 2. Write the project instructions

Click "Set project instructions". Tell Claude your role, audience, tone, and standing rules. Save it. These ride along with every chat.

### 3. Add your knowledge base

On the right, click "+" to upload documents, text, or files Claude should know: a style guide, a sample of past work, product details.

### 4. Start chatting, and reuse it

Open a new chat inside the project and give it a task from your week. Tomorrow, the context is already waiting.

## Fill-in project instructions template

My role: \_\_\_\_\_  
This project is for (audience): \_\_\_\_\_  
Tone I want: \_\_\_\_\_  
Format to use every time: \_\_\_\_\_  
Always avoid: \_\_\_\_\_  
Files in my knowledge base: \_\_\_\_\_

## Three starter projects

- Client updates: instructions in your voice + a past update as the sample to match.
- Proposals: your format and pricing rules + two strong past proposals.
- One account or product: its background, key facts, and reference docs in the knowledge base.

## Sources (Anthropic docs)

What are projects?: <https://support.claude.com/en/articles/9517075-what-are-projects>

How to create and manage projects: <https://support.claude.com/en/articles/9519177-how-can-i-create-and-manage-projects>

Collaborate with Claude on Projects: <https://www.anthropic.com/news/projects>

Claude pricing: <https://claude.com/pricing>

## Where do you stand with AI?

The free 7 Levels of AI Proficiency assessment takes about ten minutes: [assess.launchready.ai](https://assess.launchready.ai)