

STEP-BY-STEP WORKBOOK ·
BUSINESS AI SETUP · 2026

Claude & Design Setup Guide

Your step-by-step workbook to streamline your business with AI — from setup and integrations to Claude Design and templates.

Presented by **Glenn Haworth**
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resolvecoaching.com.au Welcome

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WELCOME

Hi, I'm Glenn Haworth

Founder of Resolve Business Coaching



Glenn Haworth

FOUNDER · RESOLVE BUSINESS COACHING

I built my own business from the ground up, scaling Haworth Guitars to over \$6 million per year, and now I help other business owners do the same. This workbook is designed to get you up and running with Claude Co-Work — fast. No tech jargon. No fluff. Just the steps you need to make AI work for your business, starting today.

"AI is not here to replace you. It's here to free you up to do the work only you can do."

What You Will Get From This Guide

01 Set up Claude Co-Work correctly from scratch

02 Connect your key tools — Gmail, Calendar, Drive, Canva and more

03 Understand the core features that save you the most time

04 Build a daily briefing that keeps you focused and in control

05 Set up Claude Design and create reusable templates for your business

06 Implement a simple daily AI workflow you can use immediately



How to use this workbook: Watch the tutorial video first, then work through each section in order. Tick off each step as you complete it. The whole setup takes less than 30 minutes.

What is Claude Co-Work?

Claude Co-Work is an AI-powered workspace built on Anthropic's Claude — one of the world's most capable AI assistants. Unlike a basic chatbot, it connects directly to your everyday tools, reads your emails, checks your calendar, accesses your files, and helps you think, write, plan and decide — all from one place.



Saves Time

Automates repetitive admin tasks so you can focus on revenue-generating activities.



Automates Thinking

Handles research, drafting, summarising and planning so you spend less mental energy on low-value work.



Manages Your Day

Reads your calendar and emails to give you a smart daily briefing every morning.



Content & Writing

Writes emails, proposals, social posts, reports and more — in your voice.



File Analysis

Reads and summarises documents, spreadsheets and PDFs in seconds.



Deep Research

Searches the web and synthesises information so you always have the facts you need.

1

STEP ONE

Download & Access Claude Co-Work

Getting started at claude.ai — available as both a web app and desktop application. Follow these steps to get set up in under five minutes.

1 Open your browser and go to `claude.ai`

2 Click **Sign Up** and create a **Pro** account (approximately \$30/month — required for full Co-Work features)

3 Once logged in, look for the **Download Desktop App** option in the menu — or go to `claude.ai/downloads` and download from there

4 Download and install the app for your operating system (Mac or Windows)

5 Open the desktop app and log in with your Claude account credentials

6 You're in! Explore the interface before moving to the next step

COMPLETION CHECKLIST

- Visited claude.ai
- Created or logged into my account
- Downloaded the desktop app
- Logged into the desktop app

STEP TWO

Install the Google Chrome Extension

The Claude Chrome Extension lets you use Claude directly inside any webpage — including Gmail, Google Docs, and websites you're researching.



Why it matters: Without the extension, you switch between tabs constantly. With it, Claude is always one click away — wherever you are on the web.

- 1 Open **Google Chrome** browser
- 2 Go to the **Chrome Web Store** (search "Chrome Web Store" in Google)
- 3 Search for "Claude AI" or "Claude for Chrome"
- 4 Click **Add to Chrome** and confirm the installation
- 5 Pin the extension to your toolbar by clicking the puzzle-piece icon
- 6 Click the Claude icon in your toolbar to activate it on any page

COMPLETION CHECKLIST

- Opened Chrome Web Store
- Found and installed the Claude extension
- Pinned extension to toolbar
- Tested the extension on a webpage

STEP THREE

Connect Your Tools

Claude Co-Work becomes exponentially more useful when it's connected to the tools you already use. Set up each key integration below.



Gmail

Claude reads, summarises and drafts emails on your behalf

Spend 80% less time in your inbox. Let Claude draft replies, flag priorities and summarise threads.

- 1 In Claude, go to `Settings → Connectors`
- 2 Click **Connect** next to Gmail
- 3 Sign in with your Google account and grant permissions
- 4 Test by asking Claude: *"What emails do I have today?"*



Google Calendar

Claude sees your schedule and helps you plan your day

Claude can include your meetings in your daily briefing and help you block time for deep work.

- 1 Go to `Settings → Connectors` in Claude
- 2 Click **Connect** next to Google Calendar
- 3 Authorise access with your Google account
- 4 Test by asking: *"What's on my calendar this week?"*



Google Drive

Claude can read, summarise and help you work with your documents

Stop searching through folders. Ask Claude to find, read and summarise any document instantly.

- 1 Go to `Settings → Connectors` in Claude
- 2 Click **Connect** next to Google Drive
- 3 Authorise access and choose which folders to share
- 4 Test by asking: *"Summarise my latest proposal document"*



Generate design briefs, copy and content ideas that flow directly into your Canva workflow.

- 1 Go to `Settings → Connectors` in Claude
- 2 Click **Connect** next to Canva
- 3 Log in with your Canva account and authorise
- 4 Ask Claude to help you brief a social media graphic

INTEGRATIONS CHECKLIST

- Connected Gmail to Claude Co-Work
- Connected Google Calendar to Claude Co-Work
- Connected Google Drive to Claude Co-Work
- Connected Canva to Claude Co-Work

STEP FOUR

Set Up Your Daily Briefing

A Daily Briefing is a custom prompt you run every morning that tells Claude to pull together everything you need to know to start your day — in under 60 seconds.



Why it's powerful: Most business owners start the day reactive — jumping straight into emails and fires. Your daily briefing flips this. You arrive at your desk with a clear picture of what matters most, what's on your plate, and where to focus your energy first.

- 1 Open Claude Co-Work and click **New Task** or **New Chat**
- 2 Type or paste your daily briefing prompt (see example below)
- 3 Save this as a **Pinned Task** or bookmark it for quick access each morning
- 4 Run it first thing every morning — before checking emails manually

EXAMPLE DAILY BRIEFING PROMPT

```
Good morning. Please give me a daily briefing that includes:  
1. A summary of any important emails received in the last 24 hours  
2. My calendar appointments for today  
3. My top 3 priorities based on what's outstanding  
4. Any key deadlines or follow-ups I should be aware of  
5. One AI suggestion for how I can move my business forward today
```

Write Your Own Daily Briefing Prompt Here:

DAILY BRIEFING CHECKLIST

Written my personalised daily briefing prompt

Saved the prompt as a pinned task in Claude

Run my first daily briefing successfully

Scheduled a daily reminder to run my briefing

Core Features of Claude Co-Work

Claude Co-Work is more than a chatbot. Here is a practical overview of its core capabilities and how to use each one in your business.

B Browser Access

Claude can browse the web in real time — researching competitors, finding suppliers, checking prices, and pulling together information you need fast.

Try: "Research the top 3 competitors in my industry and summarise their pricing."

F File Analysis

Upload any document — PDF, spreadsheet, Word file — and Claude will read, summarise, and answer questions about it instantly.

Try: "Here is my latest P&L. What are the key trends I should be aware of?"

T Task Automation

Set up recurring tasks, automated workflows, and scheduled prompts that run without you needing to think about them.

Try: "Every Monday morning, summarise last week's sales activity."

W Writing & Content

Claude writes in your voice. Emails, proposals, social posts, blog articles, scripts, and more — all generated in seconds.

Try: "Write a follow-up email to a prospect who hasn't replied in 5 days."

R Research & Strategy

Ask Claude to research a topic, analyse a market, or help you think through a business decision with structured pros and cons.

Try: "What are the key risks of expanding my business into a new location?"

D Daily Intelligence

Combine your briefing, calendar, emails and tasks into a single intelligent daily overview that keeps you ahead of the game.

Try: "Give me a full summary of everything I need to know to start my day."

STEP SIX

Your Simple Daily Workflow

Consistency is the key to getting value from Claude Co-Work. Use this three-part daily routine to build the habit and start seeing results immediately.

AM Morning Routine

- Run your Daily Briefing prompt
- Review your calendar and top priorities
- Ask Claude to draft any urgent emails or replies
- Identify your #1 focus task for the day

MD Midday Check-In

- Use Claude for any writing tasks (emails, proposals, content)
- Research anything you need before meetings
- Ask Claude to summarise documents or reports
- Delegate thinking tasks — let Claude do the heavy lifting

PM End of Day Wind-Down

- Review what you accomplished today
- Ask Claude: "What should I prioritise tomorrow?"
- Draft tomorrow's to-do list with Claude's help
- Close the day with a clear plan for the next morning



Pro Tip: Start with just the Morning Briefing for the first week. Once that's a habit, add the Midday and Afternoon routines. Small consistent steps create big results.



BONUS FEATURE

Build ManyChat DM Flows with Claude

Let AI design and build your Instagram & Facebook automations — live. With the Claude Chrome Extension active, describe the flow you want and Claude will build it inside ManyChat while you watch.



What You Need

Claude Chrome Extension installed, a ManyChat account at manychat.com, and your Instagram or Facebook Page connected.



No Coding Required

Claude writes all the messages, designs the conversation flow, and builds it inside ManyChat step by step.



Sounds Like You

The more context you give Claude — your tone, audience, offer — the more on-brand and effective the flow becomes.

How It Works

1 Log in to your ManyChat account at manychat.com in Google Chrome

2 Go to **Automations** → **My Automations** and click **+ New Automation**

3 Click the **Claude icon** in your Chrome toolbar to open the extension

4 Type your prompt describing the DM flow — Claude will design, write and build it while you watch

Suggested Prompts to Try

1 Lead Magnet / Freebie Delivery

"Build me a ManyChat DM flow for Instagram that triggers when someone comments 'FREE' on my post. Welcome them, ask for their email, deliver a link to my free [resource], and follow up 24 hours later asking if they found it helpful."

2 Sales Inquiry Flow

"Build a ManyChat flow that activates when someone DMs me 'pricing' or 'how much'. Introduce my [product/service], share 2-3 key benefits, show pricing, and offer a button to book a call or get more info."

3 Comment-to-DM Engagement Booster

"Create a ManyChat comment-to-DM flow. When someone comments 'YES' on my post about [topic], send them a DM with the [link/resource], thank them, and invite them to book a free 15-minute call."

4 New Follower Welcome Sequence

"Build a ManyChat welcome flow for new Instagram followers. Send an automatic DM within minutes of someone following me, introduce who I am and what I do, offer something valuable, and invite them to reply with a keyword to learn more."

5 Event or Webinar Registration

"Build a ManyChat DM flow for my upcoming [event/webinar] on [topic]. When someone comments 'REGISTER', send a DM confirming interest, collect their name and email, send the registration link, and follow up the day before with a reminder."

6 Story Reply Automation

"Create a ManyChat flow that triggers when someone replies to my Instagram story. Acknowledge their reply, ask what they're most interested in, then branch into two paths – one for [topic A] and one for [topic B] – with a relevant CTA for each."

MANYCHAT SETUP CHECKLIST

- Logged into ManyChat in Google Chrome

- Claude Chrome Extension is active in toolbar

- Connected Instagram or Facebook Page to ManyChat

- Ran my first Claude prompt to build a DM flow

- Reviewed and published the flow in ManyChat



NEW SECTION

Claude Design

Claude's built-in design workspace lets you create professional visual outputs, build reusable prompt templates, and produce consistent branded content — all without leaving Claude.

◆ CLAUDE DESIGN

Your AI-powered visual content studio

Claude Design is the AI-assisted design capability inside Claude that lets business owners create, brief, iterate and template visual content at speed — from social graphics and proposals to presentations and reports.

What is Claude Design?

Claude Design is accessed through **Claude.ai Projects** — a workspace where you can store your brand guidelines, writing style, and saved prompt templates so Claude always knows exactly how your business looks and sounds. When combined with integrations like Canva, it becomes a powerful end-to-end content creation system.

How to Set Up Claude Design

1

Create a Project in Claude

Open **claude.ai** in your browser (not the desktop app). Look for **Design** in the left column — or go straight to `claude.ai/design`. Then click **Projects** in the left sidebar and select **+ New Project**. Name it something like "My Business — Brand & Design". Projects are persistent workspaces where Claude remembers your context between conversations.

2

Add Your Brand Instructions

Inside the Project, click **Project Instructions** and add your brand voice, colours, logo usage, tone of voice, and target audience. Claude will apply this context to every conversation within the project automatically.

3

Upload Your Brand Assets

Upload your logo, brand style guide, example content, and any reference materials directly to the Project. Claude will reference these whenever you ask it to create on-brand content or design briefs.

4

Connect Canva Integration

With Canva connected (from Step 3 of this guide), Claude can now brief Canva designs directly — specifying layout, copy, colours and imagery based on your brand guidelines without you having to repeat yourself every time.

5

Start Creating

Open a new chat within your Project and start giving Claude design tasks. It will now respond with your brand voice, colours and style baked in — every single time.

Claude Design Use Cases for Business Owners



Social Media Content

Brief Instagram carousels, Facebook posts, LinkedIn articles and story sequences — written in your voice and formatted for Canva.



Proposals & Quotes

Generate professional, on-brand proposals and pricing documents in minutes. Upload your template once, use it forever.



Presentations & Reports

Create slide decks, business reports and strategy documents structured the way you like and written in your style.



Email Campaigns

Design and write entire email sequences for your



Ad Creative Briefs

Write detailed creative briefs for your designer or



Lead Magnets & Guides

Create PDFs, checklists, workbooks and ebooks.

list — from subject lines and body copy to CTAs — on brand every time.

agency, or brief Canva directly. Describe the ad, and Claude does the rest.

Upload a finished example and Claude will match the structure for new topics.

How to Create Reusable Templates

Templates in Claude Design are simply saved prompts stored in your Project that you can reuse and refine over time. Here's how to build your template library:

SOCIAL MEDIA POST TEMPLATE

Create an Instagram carousel post for my business [YOUR BUSINESS NAME].

Topic: [INSERT TOPIC]

Audience: [YOUR TARGET AUDIENCE]

Tone: [YOUR TONE — e.g. direct, warm, practical — no fluff]

Format: 5 slides. Slide 1 = hook. Slides 2-4 = key points. Slide 5 = CTA

CTA: [YOUR CALL TO ACTION — e.g. book a call, visit website, DM us]

Brand voice: [DESCRIBE YOUR VOICE — e.g. confident, no-nonsense, short punchy sentences]

PROPOSAL TEMPLATE

Write a professional proposal for a new client.

Client name: [NAME]

Business type: [BUSINESS TYPE]

Key challenge: [THEIR MAIN PROBLEM]

Proposed solution: [YOUR PRODUCT, SERVICE OR APPROACH]

Investment: [PRICE]

Tone: Professional, confident, warm. Written as [YOUR NAME] from [YOUR BUSINESS].

Include: Executive summary, key outcomes, investment, next steps, and a personal note from [YOUR NAME].

WEEKLY CONTENT PLAN TEMPLATE

Create a 5-day social media content plan for the week of [DATE].

Platform: [Instagram / LinkedIn / Facebook]

Theme for the week: [WEEKLY THEME OR TOPIC]

Each day should include: Post topic, caption (150–200 words), 3–5 hashtags, and a Canva design brief

Tone: [YOUR TONE]

Brand: [YOUR BUSINESS NAME AND KEY MESSAGE]



Template tip: Save your best prompts inside your Project's Instructions section under a "My Templates" heading. That way Claude can always see them, and you can say *"Use my Social Media Post Template for this week's topic: [X]"* — one line gets you a full post.

CLAUDE DESIGN CHECKLIST

- Created a Project in Claude.ai for my business
- Added my brand instructions to Project Instructions
- Uploaded my brand assets and style guide
- Created at least one reusable prompt template
- Used Claude Design to create my first piece of content
- Tested the Canva integration with a design brief

Your Action Plan

Use this master checklist to confirm you have completed every step. Once all boxes are checked, you're fully set up and ready to use Claude Co-Work and Claude Design in your business every day.

SETUP & ACCESS

- Downloaded and installed the Claude desktop app
- Created and logged into my Claude account
- Installed the Claude Chrome extension
- Pinned the extension to my Chrome toolbar

INTEGRATIONS CONNECTED

- Connected Gmail to Claude Co-Work
- Connected Google Calendar to Claude Co-Work
- Connected Google Drive to Claude Co-Work
- Connected Canva to Claude Co-Work

DAILY BRIEFING & WORKFLOW

- Written my personalised daily briefing prompt
- Run my first daily briefing successfully
- Completed my first Morning Workflow session
- Committed to a daily AI routine for 30 days

CLAUDE DESIGN

- Created a Project with brand instructions
- Built at least 2 reusable prompt templates
- Created first piece of content using Claude Design
- Used Claude to brief a Canva design

You're all set! 🎉

You now have everything you need to run AI inside your business every day. The next step? Join the **Resolve Business Club** — a community of serious business owners using AI, coaching and strategy to grow faster, work smarter, and build something they're proud of.

[Find Out More About the Resolve Business Club →](https://www.resolvecoaching.com.au/resolve-business-club-landing/)

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