✦ INTRO TO CLAUDE · CLASS HANDOUT

Getting Started with Claude AI

This is the exact setup I use to run my real estate business with AI. No jargon, no fluff — just the handful of things that'll start saving you hours every week. Follow along and by the end of class you'll have it working.

4 simple steps | Real examples | ~30 min to get going

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START HERE

What Claude Actually Is

Let me clear something up before we go any further. Most people think AI is a fancy search box — you ask it a question, it gives you an answer. Claude does that too. But that's not why I use it.

Here's the difference that matters: Claude doesn't just *talk* to you, it *works* for you. It can log into the tools you already use — your email, your calendar — and actually get things done. Think less "search engine," more "assistant who never clocks out." That's the whole game, and once you see it, you can't unsee it.

The simplest way I explain it

	A regular chatbot	Claude, working for you
What it's for	Answering questions	Doing the actual task
Your tools	Can read what you paste in	Logs in and takes action for you
Best for	Quick info	Running your day-to-day

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FIRST THINGS FIRST

Get Set Up

Before Claude can do the fun stuff, we need it installed in the right places. Knock these out and you're ready to roll.

- [ ] **Upgrade to Claude Pro** $20/mo
  The free version is fine for playing around, but the features I'm showing you today live on the paid plan. It's worth it — this is the plan that does the work.

- [ ] **Download the Desktop App** Don't Skip
  This is the big one. The full experience doesn't run in a web browser — you need the desktop app. Grab it first.

- [ ] **Add the Chrome Extension**
  This gives Claude "eyes" on the web so it can look at things like your Instagram or a listing when you ask it to.

- [ ] **Get the Mobile App**
  This is how you talk to Claude on the go — tap the mic and brain-dump your thoughts between showings. It sorts them out for you.

💡 **My take**

If you're just curious, start free. But the day you want Claude actually doing your work instead of just chatting, get on Pro. That's where the time savings live.

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KNOW THE LINGO

The Words You'll Hear Me Use

A few terms will come up all class. Here's what they mean in plain English so nothing trips you up.

- **Chat**

  The basic screen for asking questions. You've seen this before.

- **Co-work**

  Where the magic happens. This is where you hand Claude a task and it goes and does it across your tools.

- **Projects**

  Folders that keep things organized. I keep separate ones for sales, listings, and marketing so Claude stays focused.

- **Artifacts**

  Where Claude saves the stuff it makes for you — dashboards, drafts, checklists — so you can grab them again later.

- **Skills**

  Routines you teach Claude once so it does them your way every time (like "my Friday newsletter").

- **Connectors**

  How you plug your tools into Claude — Gmail, Google Calendar, Canva. Once they're connected, Claude can actually use them, not just talk about them.

- **Extensions**

  The Chrome extension is Claude's "eyes" on the web. It lets Claude look at your Instagram, a live listing, or your CRM right in the browser.

- **The Microphone 🎤**

  In the app, tap it and just talk. Perfect for dumping ideas while you're driving.

⚠️ **See a tab called "Claude Code"? Ignore it.**

That one's built for software developers, not us. You'll never need it. Stick with **Chat** and **Co-work** and you're golden.

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STEP 1

Teach Claude Your Voice

This is the step most people skip, and it's the one that makes everything else sound like *you* instead of a robot. Before you ask Claude to write anything, let it learn how you actually talk.

Here's exactly what to do

1. **Open the desktop app with your Chrome extension on**
2. **Paste it this command**

   "Look through my Instagram and Facebook and my sent emails to clients to learn about me and how I write. Build me a set of brand guidelines, and ask me questions to fill in anything you're missing."

3. **Answer its questions**

   Claude will ask you a few things. Answer honestly — this is what dials it in.

What you get back

Claude builds you a "voice profile" — a little file that captures things like:

- **Your tone** — buttoned-up or laid-back, and when to be which.
- **How you sound on social** vs. how you sound with a client.
- **Your sign-offs** — how you actually end an email.
- **What you never say** — the words and phrases you want it to avoid.

🤖 **A little trick: name it**

Give yours a name. I know — mine's just "Claude." Not very original, but that's what I call it, and naming it makes the whole thing feel like a real assistant on your team that keeps applying your voice without being asked every time.

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STEP 2

Connect Your Tools

This is what turns Claude from "smart chatbot" into "assistant." Go to **Customize > Apps** and connect the big ones first — the tools you already live in every day.

EMAIL KW Gmail

CALENDAR Google Calendar

FILES Google Drive

DESIGN Canva Enterprise

⭐ **Start with the big two: Gmail & Google Calendar**

These do the heavy lifting. Once they're connected, Claude can read your day, draft and reply to emails, and block time on your calendar — the stuff you do all day long. Add Drive and Canva after.

🔌 **Already have a CRM? You're covered.**

We're not adding anything complicated here. You already have a CRM you like — and between the Chrome extension and Claude, we can work right inside it. No new software, no code, no setup headaches. I'll walk you through it live.

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STEP 3

Put Claude to Work

The real unlock is **Skills** — reusable routines Claude follows. Some come built in; the best part is you can build your own.

⌨️ **Forget what Claude can do? Type** `/`

In any chat, type a single forward slash and a menu of your skills pops up — a built-in cheat sheet of everything Claude can do for you. Can't remember the name of a skill? Just hit "/" and pick it from the list.

Two skills to see it in action

1. **Listing Marketing Specialist**

   "For my new listing at [address], build the full marketing package — plan, MLS copy, social posts, and buyer emails — in my voice, Fair Housing compliant."

2. **Newsletter**

   "Write my monthly market-update newsletter in my voice — a local angle, one genuinely useful tip, and a soft call to action."

Set a skill up once, then run it with a single line — Claude does the rest the same way every time.

Build your own Skill — just ask

Here's the secret: **you don't build it — Claude does.** Tell Claude the routine you run over and over, give it a name, and let it do the work:

"Create a skill called 'Listing Marketing Director' that plans and writes all the marketing for a new listing — in my voice, Fair Housing compliant."

Claude writes the whole thing and hands you the file. Then just add it under **Customize > Skills** and turn it on — Claude uses it automatically whenever it fits. No writing, no code, nothing to memorize.

Smarter skills worth building

- **Weekly Business Review** — pulls your numbers, spots what's slipping, and hands you the three things to focus on Monday morning.
- **Buyer Consultation Prep** — researches your buyer's target neighborhoods and builds your talking points and questions before the meeting.
- **Just Sold Campaign** — spins up the full post-close package: social posts, a client thank-you, and a referral ask, all in your voice.
- **Price Reduction Play** — drafts the market-backed case, the seller conversation, and the "improved price" announcement in one shot.

🏗️ **Don't want to build it? I already did.**

The **Listing Marketing Director** — one skill that researches the neighborhood, finds the hero angle, and writes the entire listing's marketing (plan, MLS copy, social, emails, and more) — is free on **jimmysprompts.com**. Grab it and run it on your next listing.

🔁 **Put a skill on repeat**

Any skill can run on a schedule. Have your Newsletter draft itself every Monday, or set a standing weekly reminder — Claude runs it in the background and can **ping you by push or email** when it's ready. (Yes, just like ChatGPT's tasks.)

One quick note on "models"

You'll see options for which "brain" Claude uses. Keep it simple:

Sonnet
YOUR DEFAULT
Handles almost everything. Leave it here.

Haiku
THE QUICK ONE
Fastest for simple stuff.

Opus
THE DEEP THINKER
For the big, complicated jobs — uses more tokens.

Fable
THE POWERHOUSE
The most capable — and it burns through a LOT of tokens. Save it for your heaviest lifts.

✅ **Easy rule**

Live on **Sonnet**. Reach for Opus or **Fable** only when a task is genuinely big — they chew through **way more tokens**, so don't burn them on the little stuff or you'll run your plan down fast.

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STEP 4

Your Morning Dashboard

This is my favorite. One command and Claude builds you a "mission control" for the day — your tasks, your leads, your deals, all in one spot.

⌨️ **How to pull it up**

Type this in any chat: `/good morning dashboard`

What shows up on it

- **Your Daily Three** — the three things that actually matter today.
- **New leads** — with replies already drafted, ready for you to okay and send.
- **Your pipeline** — a quick look at where your deals stand.

🌅 **Set it and forget it**

Tell Claude, *"Run this dashboard for me every morning at 7 AM,"* and it'll be waiting for you every day. You can manage it anytime under the **Scheduled** tab.

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MAKE IT STICK

How to Actually Get Good at This

Real talk: Claude saves you serious time, but it's not a magic button. The agents who get the most out of it are the ones who spend a little time with it up front.

🎯 **Give yourself "AI playtime"**

Block **two hours a week** just to mess around with it — try a new task, tweak your voice profile, connect a tool. Do it on your own time so you're never fumbling with it mid-workday.

💬 **Stuck on where to start? Ask it.**

Try this: *"You can see my email and calendar. Give me three ways you could save me time this week."* Then let it show you.

Your Homework

Do these four before we meet again and you'll be up and running.

1 · SET UP

Install the essentials

Get the desktop app and Chrome extension.

2 · CONNECT

Plug in your tools

Start with your email and calendar.

3 · TRAIN

Teach it your voice

Run the command from Step 1.

4 · AUTOMATE

Set your dashboard

Schedule it for 7 AM tomorrow.

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