FREE GUIDE · FOR SMALL BUSINESS OWNERS

Your first week with AI

Ten minutes a day. By the end of the week, you'll have an AI assistant that knows your business.

★ **Your week**

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Your week

One small thing a day, about ten minutes each.

DAY 1	**Download the right app,** pick a plan, and try the microphone: ask it anything out loud. **Sections 1 and 2**
DAY 2	**Add three instructions to your settings** that make the AI more honest with you. You only do this once. **Section 4**
DAY 3	**Check your privacy settings.** Then hand it that long document you've been avoiding. **Sections 6 and 8**
DAY 4	**Have it turn last week's sales into a table,** without client names. Double-check the total yourself. **Sections 5 and 8**
DAY 5	**Set up a project:** who you are, what you sell, your prices, how you want it to talk. About twenty minutes, so have your price list handy. **Section 7**
DAY 6	**Inside the project, reply to a real client message** (take out the name and phone first). Compare it with what you got outside the project. **Sections 6, 7 and 8**
DAY 7	**Talk through everything you've got next week** and have it build a day-by-day plan. Save the prompts that worked. **Sections 3 and 8**

1 The first ten minutes

Download the right app. App stores are full of lookalikes with almost the same name. Check the developer: Claude is made by Anthropic, ChatGPT by OpenAI, Gemini by Google.

Two buttons you'll use right away:

- **The microphone** in the message box. Tap it and just talk, the way you'd leave a voice note for a friend.
- **The plus sign or paperclip** next to it. Snap a photo of a document or attach a file.



The message box in Claude: the plus on the left, the microphone on the right. ChatGPT and Gemini have similar buttons.

Language. Write in whatever language you're most comfortable with. It replies in the same language.

Settings and projects are easier to set up on a computer, at claude.ai. On your phone, you'll find them in the menu under your name.

2 Which AI to use, and is it worth paying for

My recommendation: Claude Pro, $20 a month ($17 a month if you pay yearly). It's what I use every day.

You can get through the first few days on the free plan. But it has a message limit that goes up and down, and you only get five projects. If you use it daily, you'll run into that limit quickly. When you do, wait a couple of hours or switch to a different AI for a while. You manage your plan under Settings → Billing.

Already using ChatGPT or Gemini? Most of this week works there too, and I'll point out where to find things in both. One catch: the free ChatGPT doesn't always give you a downloadable Word or Excel file.

From here on, the examples use Claude.

3 Four rules for better answers

Getting so-so answers? Usually the problem isn't the AI, it's how you're asking.

1. **Give it context.** Who the answer is for and what you want back: a Word file, a table, five lines for WhatsApp. "Write something" isn't enough. Attach your own files and examples.

2. **One task per chat.** When you're done with something, open a fresh chat for whatever comes next. Long chats get messy.

3. **Fix it instead of starting over.** Say what's wrong in the same chat: "too long, cut it to five lines".

4. **Save what works.** When a prompt gets you a great result, keep it in your notes and reuse it.

4 Three instructions that make the AI more honest

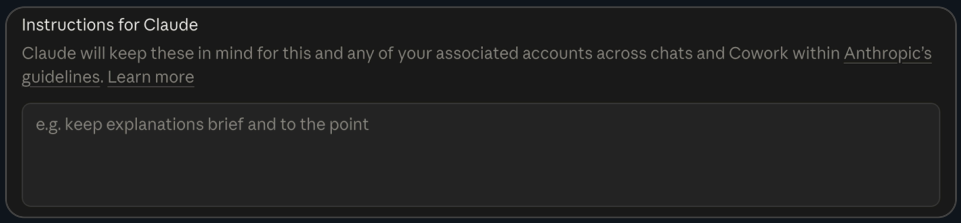
AI assistants are built to be helpful, so they jump straight into the task and tend to go along with whatever you say. They get more accurate and more honest when you ask them to. So ask for three things: **ask me any questions you need before answering**, **give me the arguments for and against**, **show me what your answer is based on**. Add them to your settings once:

COPY INTO YOUR SETTINGS

Be honest with me, even if it's not what I want to hear. Don't just agree with me to be polite. Before you answer a complicated question, ask me any questions you need to. Give me the arguments for and against. Tell me what your answer is based on. If you're not sure, say so. Keep it short and use plain language.

Where to paste it:

- **Claude:** your name in the bottom left, then Settings → Account → Instructions for Claude.
- **ChatGPT:** Settings → Personalization, turn on Enable customization, then Custom instructions.
- **Gemini:** create a Gem with your own instructions (section 7).



Claude: Settings → Account → Instructions for Claude.

5 How to check an answer

The AI can sound completely sure of itself and still be wrong. It sometimes gets numbers wrong. And it may change its answer if you push back. So for anything important, ask:

How do you know that?

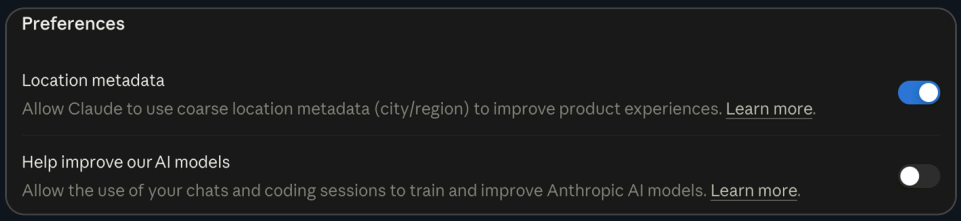
What's that based on? Give me a link.

Don't just ask "are you sure?". That tends to make it switch answers rather than double-check. And always check totals yourself. Checking a number is a lot faster than calculating it from scratch.

6 What not to share with the AI

Don't treat the AI like a safe. A few simple rules:

- **Never paste** passwords, card numbers or ID details.
- **Remove client details.** Write "client A" instead of a name and phone number. The AI doesn't need them to write a reply or do the math.
- **Turn off training on your chats.** Claude: Settings → Privacy, Help improve our AI models off. ChatGPT: Settings → Data controls, turn off Improve the model for everyone. Gemini: Settings & help → Activity, turn it off.
- **Health, legal and tax questions.** The AI can help you understand the situation and prepare your questions. The final decision belongs with a professional.



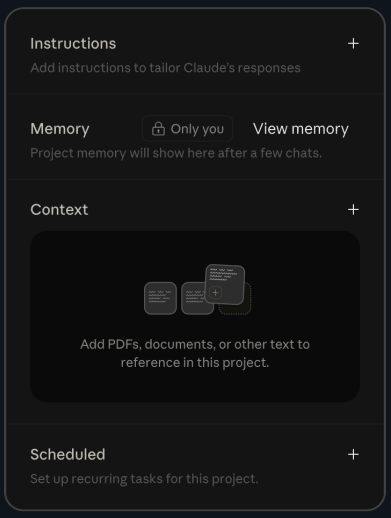
Claude: Settings → Privacy. Help improve our AI models is switched off.

7 Set up a project so the AI knows your business

A regular conversation starts from scratch every time. A project is like a folder for your business: you add the key information once, and every conversation inside it starts with that knowledge. Claude's free plan includes up to five projects.

How to set one up in Claude:

1. Go to Projects on the left, then New project in the top right. Name it, like "My business", and click Create project.
2. On the right, the Instructions box: click the plus and paste the template from the next page.
3. Below it, the Context box: click the plus and upload your files.
4. Start chatting right on the project page. Claude already knows your instructions and files.



The project page: Instructions and Context on the right, each with a plus.

Each conversation in a project is separate: one can't see what you discussed in another. They all share only the project instructions and files. If something needs to be remembered everywhere, add it to the files.

7 What to put in the project

PROJECT INSTRUCTIONS, TEMPLATE

I [what you do, and whether you work alone or with a team]. My clients are [who they are, what language they write in, what they ask about most]. Keep your answers short, in English, and in a friendly tone (or a formal one, if you prefer). If you don't know something about my business, ask me instead of guessing.

For example: "I run a home renovation business with a crew of three. My clients are families who just bought an apartment. They write in English and Hebrew, and they mostly ask about timelines and quotes."

Files to upload:

- Your price list, or a list of your services and products.
- The questions clients ask most, with your answers.
- Two or three messages or posts you've written that you like. That's how the AI learns your style.

You can even use it to keep simple records: add a file with each week's sales and ask it for the totals.

In ChatGPT and Gemini. ChatGPT also has projects on the free plan: go to Projects, create a new one, and add your instructions and files (up to five files for free). Gemini's version is called Gems: you create them at gemini.google.com and give them your own instructions.

8 Eight prompts you can copy

Copy one and fill in the brackets.

REPLY TO A CLIENT

Here's a message from a client: [paste it, without their name or phone number]. Write a reply that's polite, short, and ends with a clear next step. Give me three versions, from gentle to direct.

GET THE GIST OF A DOCUMENT attach the file or a photo

Explain briefly and in plain language what's important here, what I need to do, and by when. No more than five points.

ADD UP YOUR SALES

Here are my sales for the week: [your notes or a photo, without client names]. Put them in a table: date, what I sold, amount. Give me the total and tell me what sells best. Make it an Excel file with a chart.

EMAIL A SUPPLIER

Write an email to a supplier: [what you need]. Keep it short and professional, and include the date I need an answer by.

8 Four more

SUM UP A CALL

Here's a transcript of a call with a client: [paste it, with names replaced]. What did we agree on, who promised what, and by when? Give me a list.

IDEAS FOR POSTS

I [who you are and what you sell]. Give me five ideas for posts about my business, one line each. No generic advice.

WORK OUT A PRICE

Help me price [a service or product]. Here are my costs: [paste them]. Show the math step by step.

PLAN YOUR WEEK tap the mic and say what's on your plate

Turn this into a plan for the week, day by day. Keep it short.

9 Where to go from here

Everything in this guide works when you ask. The next step is a system where your numbers, clients and tasks come together in one place on their own, so every morning you can see where your business stands. I build systems like that together with business owners, around how their business actually runs.

How the second brain works
kaimei.co/second-brain

A free 15-minute call to talk about your business
kaimei.co/call



About me
Oleg Gitman, Kaimei. I build AI systems together with small business owners: we find where time, money and energy are leaking, and take the repetitive work off your plate.

kaimei

kaimei.co