

START HERE

Set up one useful AI role in Claude, test it safely, and complete one approved handoff.

Get the book: <https://www.amazon.com/dp/B0H2FHSBDR>

Your first setup

1

Create one private business project

Use a dedicated Claude project if your current plan supports Projects. Keep personal chats separate from business work.

2

Add the Business Context Pack

Include the current buyer, offer, constraints, founder authority rules, and approved source material.

3

Create the first useful role

Begin with the role the business needs now. State its purpose, input, output, quality check, and approval point.

4

Run one low-risk test

Use fictional, anonymized, or approved information. Name the source versions and the exact output you expect.

5

Review and correct the result

Check evidence, assumptions, omissions, tone, scope, and whether the output is ready for a business decision.

6

Save one approved handoff

Store the corrected version as an approved record. Pass only that named artifact and version to the next role.

Completion condition

You are ready to continue when you have one dedicated workspace, one current Business Context Pack, one tested role, one corrected and approved output, one completed handoff, and one record of what must improve.

Use the first result as evidence, not authority

Claude prepares work. The founder decides what becomes a promise, message, price, payment, publication, scope change, or customer-facing action.

First test assignment

Give the Research role a small set of labeled fictional buyer notes. Ask it to identify direct evidence, separate interpretation from fact, list missing information, and stop rather than inventing support. Compare the result with your own reading before adding more roles.

Review before the handoff

Confirm the output uses the supplied sources, distinguishes evidence from assumptions, follows the requested format, names what is missing, and stays within the role's authority. Correct the result and save the approved version before another role uses it.

Keep these actions with the founder

Customer contact, publication, commitments, prices, refunds, payments, scope changes, deletion, sensitive records, and consequential decisions require founder approval. Do not connect external tools or customer communication during the first test.

Privacy and setup safety

Do not upload confidential customer information without permission and an appropriate account and data policy. Begin with fictional, anonymized, or low-risk material. Claude capabilities, plan limits, persistence, sharing, integrations, and automation can change, so confirm the current product guidance before relying on them.

Continue with the complete kit

The AI Team Business Starter Kit includes editable worksheets, business context tools, role blueprints, reusable prompts, a formula-driven workbook, and worked examples.

Complete Starter Kit: <https://dcfrancisco.github.io/ai-team/>

Get the book: <https://www.amazon.com/dp/B0H2FHSBDR>

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