

Claude: Beginner to Pro

The complete setup cheat sheet. Everything from the video on two pages.

The 3 Levels

- **Level 1:** Chat. You type, Claude responds. You do all the work.
- **Level 2:** Cowork. Your assistant. Handles daily tasks on your desktop.
- **Level 3:** Claude Code. Your engineer. Builds tools, systems, automations.

Your Project Folder

Every project gets its own folder. Claude reads these files for context.

```
/Your-Project/  
  INSTRUCTIONS.md      <- Employee handbook  
  MEMORY.md           <- Long-term brain (the hack)  
  CONTEXT-strategy.md  <- Reference docs for the job  
  /outputs/           <- Where work goes
```

INSTRUCTIONS.md

This is your agent's employee handbook. Five sections:

- **Who you are:** One line. "You are my [role] for [project]."
- **What you do:** List the actual tasks. Be specific, not vague.
- **Rules:** Tone, fact-checking, when to ask questions vs guess.
- **Good output:** Describe ideal output. Length, format, style.
- **Memory rule:** "Read MEMORY.md at start. Update it at end."

Template (copy this):

```
# INSTRUCTIONS  
  
## Who You Are  
You are my [role] for [project/company].  
  
## What You Do  
- [Specific task 1]  
- [Specific task 2]  
- [Specific task 3]  
  
## Rules  
- Match my tone: [describe your voice]  
- Never invent stats - flag anything needing a source  
- If unclear, ask ONE question before starting  
- When you learn something new, add it to MEMORY.md  
  
## What Good Output Looks Like  
- [Your format/length/style preferences]  
  
## Memory  
Start of every session: read MEMORY.md  
End of every session: update MEMORY.md with new learnings
```

The Memory Hack

Claude doesn't remember between sessions. MEMORY.md fixes that.

- Add this to your INSTRUCTIONS.md: "Read MEMORY.md at the start of every session. Update it at the end with new preferences, corrections, and patterns."
- Claude logs four things: preferences, corrections, patterns, decisions.
- Every correction gets written down. Same mistake never happens twice.

Cheat Sheet — Page 2

AI Edge

MEMORY.md Template

```
# MEMORY

## Preferences
- [Format preferences, tone, tools, length]

## Corrections
- [Mistakes Claude made + what the right answer was]

## Patterns
- [Recurring tasks, common workflows, frequent requests]

## Decisions
- [Choices made together that shouldn't be revisited]
```

Don't edit this manually. Let Claude maintain it. It grows every session.

Context Files — What to Include

Only include docs relevant to the agent's job. Name them clearly.

- **Content creator:** Content strategy, brand voice, past scripts
- **Business owner:** Company overview, SOPs, product docs
- **Freelancer:** Client briefs, portfolio summary, rate card
- **Developer:** Architecture docs, coding standards, API specs

Think: what would I hand a new employee on their first day?

The Pro Loop

This is how Cowork and Claude Code work together:

1. Give Cowork a real task from your daily work.
2. Notice when you keep giving the same type of task.
3. That's your signal. Go to Claude Code.
4. Code builds a system that automates that task permanently.
5. Cowork's job shifts — it reviews instead of creates.
6. Repeat. Every loop = less manual work.

The Compounding Timeline

- **Week 1:** You're handing off individual tasks.
- **Week 4:** You've built systems that handle whole categories of work.
- **Week 8:** The agents are compounding while you sleep.

20-Minute Quick Start

- [] Create your project folder.
 - [] Write INSTRUCTIONS.md using the template on page 1.
 - [] Create MEMORY.md with the four sections (preferences, corrections, patterns, decisions).
 - [] Add one or two context files relevant to your work.
 - [] Open Cowork and give it a real task. Not a test — something you'd actually do today.
 - [] After a few sessions, notice the patterns. That's when you build with Code.
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