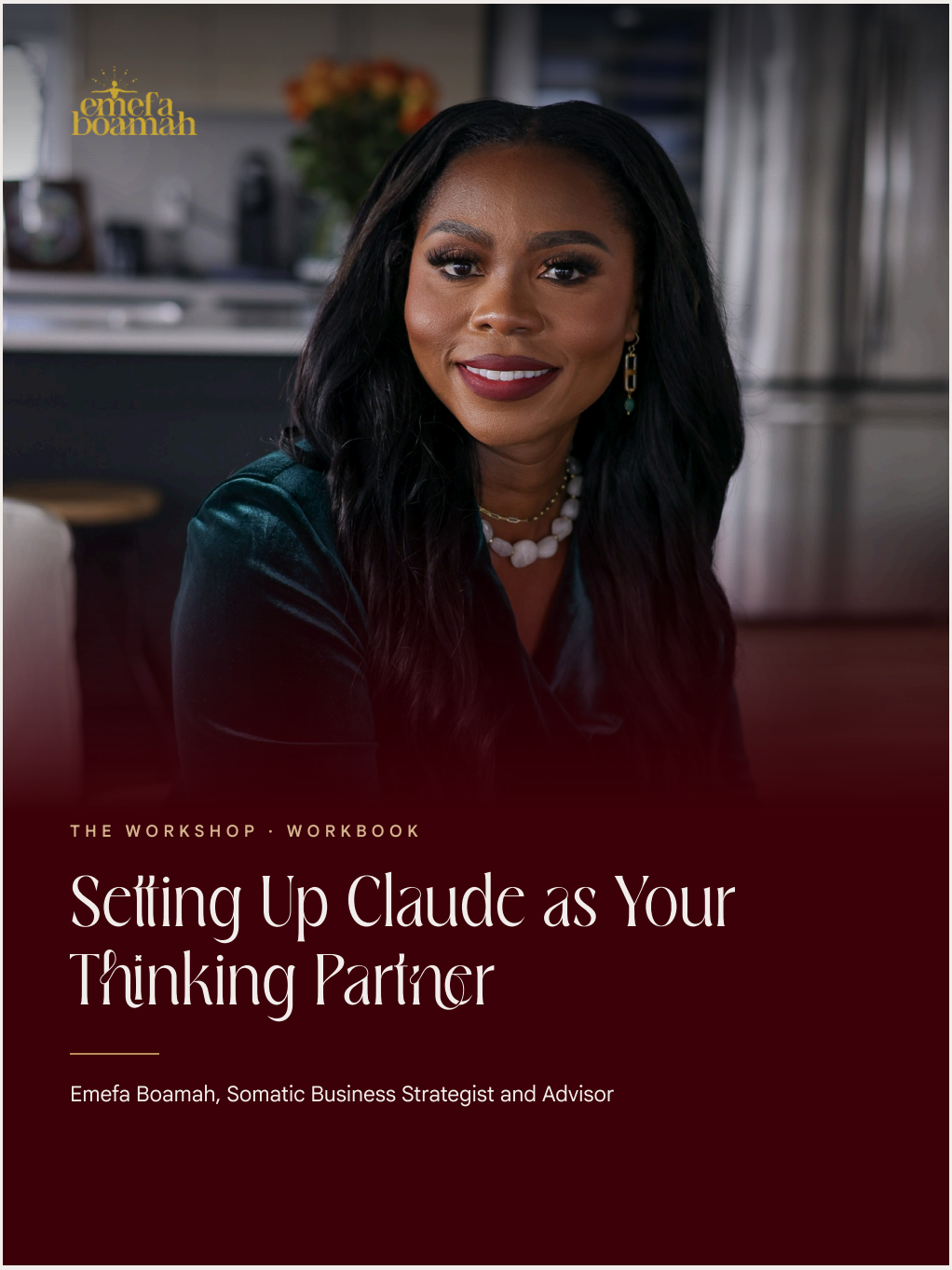

THE WORKSHOP · WORKBOOK

Setting Up Claude as Your Thinking Partner

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Women's Exchange of Washtenaw

emefa boamah

SCAN FOR TODAY'S LINKS

This belongs to: _____

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OVERVIEW

Today

You leave with three things. Claude is only as useful as what it knows about you. This hour is how you teach it.

01

A context document

Who you are, how you work, how you sound.

02

A working Project

A place where Claude already knows your work.

03

Your first handoffs

What to give Claude, and what stays with you.

Write rough. Speak it if that's easier. Your exact words are the point.

> **Prompting from urgency vs. presence.** Most of us open AI when we're already behind and braced, and a dysregulated prompt gets back noise: generic, frantic work that doesn't sound like you. A thinking partner starts with your body, not the keyboard. Pause, name what is true across your five facets, and give Claude grounded context.

THE LANDSCAPE

What Claude Is

An AI you talk to in plain language. It reads, writes, thinks things through with you, and makes things for you. It starts out knowing nothing about you.

WAY TO WORK	WHAT IT'S FOR
Chat FREE & PRO	Ask, think out loud, get an answer.
Projects FREE & PRO	A home for one part of your work, with your context already in it. Free accounts include up to 5 Projects.
Doing the work FREE & PRO	Claude takes a task and makes the thing. You may know this as Cowork. It's now just Claude.
Scheduled tasks PRO	Claude does something on its own, on a schedule.
Claude Code PRO	For building software. Not for today.

YOUR CONTEXT DOCUMENT

The Somaxis™ Operating System

Five facets of being, read two ways at once — because you and your business are the same system. They co-regulate, or they co-collapse.

"Your business or work" means whatever you're building or tending right now: a business, a job or role, a creative practice, a ministry or community, a project, or the business you haven't started yet.

THE FACET	IN YOU	IN YOUR BUSINESS OR WORK
The Temple PHYSICAL	Your physical body. How you experience your five senses, and how you connect to rest and movement.	THE WHAT Your offerings. Your products, your services, the tangible what.
The Architect MENTAL	The stories you hold about the world, how it operates, and about other people.	THE HOW Your strategy and systems, the how. Think of it like a traditional business plan.
The Depths EMOTIONAL	Your feelings, using your emotions as guides. How open you are to connecting emotionally with yourself and with others.	THE WHO Three parts. The transformation the people you serve experience. Your team culture: how you work together and how team members feel. And how you feel about your business or work.
The Current ENERGETIC	Your rhythms, capacity, and boundaries. In the full framework this includes the chakra system. Today, we focus on your energetic boundaries.	THE WHEN The flow of resources: time, money, and people.
The Origin SPIRITUAL	Connecting to something larger than yourself, and to your purpose.	THE WHY The purpose of your business or work beyond profit and making money.

THE BUILD

Write It

The Temple PHYSICAL

ABOUT YOU
How does your body feel when you work, and how do you rest and move?

ABOUT YOUR BUSINESS OR WORK · THE WHAT
What do you offer?

STARTER	YOUR ANSWER
ABOUT YOU When I work well, my body feels...	
ABOUT YOU I rest and move by...	
ABOUT YOUR BUSINESS OR WORK What I offer is...	

The Architect MENTAL

ABOUT YOU
What stories do you hold about the world and other people, and how do you think and decide?

ABOUT YOUR BUSINESS OR WORK · THE HOW
What is your strategy, and how does your business or work run?

STARTER	YOUR ANSWER
ABOUT YOU A story I hold about how the world works is...	
ABOUT YOU A story I hold about other people is...	
ABOUT YOU The way I make decisions is...	
ABOUT YOUR BUSINESS OR WORK My strategy, in plain words, is...	

THE BUILD

Write It

The Depths EMOTIONAL

ABOUT YOU
How do your emotions guide you, and how open are you to connecting with yourself and others?

ABOUT YOUR BUSINESS OR WORK · THE WHO
What changes for the people you serve, how does your team feel, and how do you feel about your business or work?

STARTER	YOUR ANSWER
ABOUT YOU My emotions guide me by...	
ABOUT YOUR BUSINESS OR WORK What changes for the people I serve is...	
ABOUT YOUR BUSINESS OR WORK On my team, people feel... (skip this if you work solo)	
ABOUT YOUR BUSINESS OR WORK How I feel about my business or work right now is...	

THE BUILD

Write It

The Current ENERGETIC

ABOUT YOU
What are your energetic boundaries, and how do you know when you're crossing them?

ABOUT YOUR BUSINESS OR WORK · THE WHEN
Where do your time, money, and people flow?

STARTER	YOUR ANSWER
ABOUT YOU My energetic boundaries are...	
ABOUT YOU I know I'm crossing them when...	
ABOUT YOUR BUSINESS OR WORK My time, money, and people move like...	

The Origin SPIRITUAL

ABOUT YOU
How do you connect to something larger than yourself?

ABOUT YOUR BUSINESS OR WORK · THE WHY
What is the purpose of your business or work beyond profit and making money?

STARTER	YOUR ANSWER
ABOUT YOU I connect to something larger than myself through...	
ABOUT YOUR BUSINESS OR WORK Beyond profit and making money, my business or work exists to...	

BRING IT TO CLAUDE

Your Voice

A few lines that help Claude write the way you do. Add them below your five facets before you paste.

STARTER	YOUR ANSWER
Words I use all the time:	
Words that are never me:	
What I never want from Claude is...	

Paste It Into Claude

Open Claude. Paste your rough answers, then add this prompt above them.

THE PROMPT

I'm building a context document so you can support my work. Below are my rough answers to five sections: The Temple, The Architect, The Depths, The Current, The Origin. Organize them into a context document. Keep my exact words. Don't polish or upgrade my language. Then tell me what's missing and ask me questions, one at a time.

Answer what it asks. When the document feels like you, save it.

BEFORE YOU PASTE

Privacy Check

You are about to put your story and your work into Claude. Take two minutes to check these on your own device.

- [ ] **Turn off model training.** Settings, then Privacy, then switch off **Help improve Claude**. Some screens say “Help improve our AI models.” This applies going forward. Chats flagged for safety review, or ones you rate with thumbs up or down, can still be used.

- [ ] **Review what you have shared.** Settings, then Privacy, then **Manage** next to Shared chats. Choose **Unshare** for anything you do not want a link to. Inside any chat, the Share menu lets you change it from Public to Private.

- [ ] **Use Incognito for sensitive chats.** Incognito chats are not used to improve Claude.

- [ ] **Keep the document clean.** Do not put private client names or confidential records in your context document.

> Menus change, so look for the closest wording. On a work or team account, your organization’s settings may differ. Ask your admin.

SET UP

Create Your Project

About ten minutes.

01

Create a new Project and name it for your business.

02

Add your context document to **Project Knowledge** or **Set Project Instructions**.

03

Start a new chat inside the Project.

Keep in mind: Put your context in Project Knowledge or Set Project Instructions, not the short Project Description box, which Claude cannot read.

Test It

Pick something you would actually do this week. Ask Claude. Then ask it: what's missing from what you know about me?

PROMPT	YOUR ANSWER
The request I asked	
What sounded like me	
What didn't	
What Claude was missing, to add to my document	

HOW TO TALK TO CLAUDE

Stop Using It Like a Search Engine

01 Ask it to interview you before it writes.

"I'm working through [a decision / offer / email]. Don't write anything yet. Ask me 3 questions, one at a time, to help me clarify what I actually think."

02 Ask it to mirror your blind spots and capacity.

"Here is my plan for this month. Based on my boundaries in The Current, where am I overcomplicating this or overriding my own rhythm?"

03 Ask it to point out gaps without polishing your voice.

"Here is my rough draft. Point out where a reader might get confused or lose interest, but don't rewrite my tone."

Rule of thumb: Never accept the first output as the final product. Treat it like a conversation.

What Claude Can Hand Back

A document, slides, a design, or a dashboard. Ask your Project for one thing you'd use this week.

ARTIFACT	YOUR ANSWER
The one I'll ask for first	

DAILY RHYTHM

Your Morning Brief

What needs your attention today, and what can wait. Scheduled tasks need a paid plan, but you can run the same brief on demand for free.

Every weekday at 7:30, give me my morning brief. What's on my calendar, what in my inbox needs me, and what can wait. Keep it short. Write it in my voice.

DECISION	YOUR ANSWER
What I want in my brief	
What I want left out	
When and how often	
What it needs to read, like my calendar or inbox	

ON A FREE PLAN

Paste the prompt into your Project Instructions with this line: "When I type 'Morning brief', ask for my day's priorities and run this brief."

ON A PRO PLAN · $20/MO

Click **Scheduled** in the left sidebar, then **New task**. Paste the prompt, review the name and schedule Claude proposes, and set 7:30 AM.

DELEGATION

Your First Handoffs

What to give Claude, and what stays with you. Start with the things that begin from a blank page.

GIVE TO CLAUDE THIS WEEK	STAYS WITH ME	TRY LATER

Keep It Alive. A new offer or a new price: update the document. Claude gave you something generic: add what it was missing. Every few months, read it back and keep what's true.

BEFORE YOU GO

Next Steps

Thank you for being here. Everything from today lives in one place. Scan the code to get your workbook, take the survey, and keep going.

1. Attend a Breathwork Session in Royal Oak on 11/20 and 11/21.
2. Share how today landed in the Workshop Survey.
3. Stay connected: everything in one place at emefaboamah.com/wxwforum26.

NEXT STEPS

Thank You

SCAN FOR TODAY'S LINKS

