



YOUR WAY *TO AI*

The Ground-Up AI Guide

How to put Claude to work in your business — written by someone who actually does it every day, on real quotes, real invoices and real inboxes.

FREE • NO EMAIL WALL • COPY-PASTE PROMPTS INSIDE

Luke Povey • Your Way to AI

yourwaytoai.co.uk • WhatsApp 07777 278337 • hello@yourwaytoai.co.uk

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Who I am, and why this is free

Two minutes. Then we crack on.

I'm Luke. I work shifts — five on, five off — and on my off-days I go into small businesses and set AI up on their real work. Quotes, invoices, emails, accounts. Not theory. The actual jobs eating your evenings.

I'm not a tech guy by trade. A few years back, at 23, an uninsured driver hit me head-on at 60mph. Fractured spine, tendon and ligament damage, carpal tunnel — my hands went so numb I was dropping the spoon in my cereal. I lost my confidence, my job and my flat, and spent a long time as a shell of myself. What I rebuilt with, in the end, was this tool. I used Claude on everything — my money, my letters, my planning, my career — and worked my way back up to regional manager before giving that up to do this properly.

So this guide is the stuff I actually use, written the way I'd tell you across a table. It's free because I'd rather prove I know what I'm doing than tell you I do. Everything in here works without ever paying me a penny. Some of you will read it, crack on, and I'll never hear from you — honestly, brilliant. Some of you will decide you'd rather have it done with you in a day. That's the other thing I offer, and it's on the last page. No email wall, no mailing list, no drip campaign. Just use it.

The one rule that makes all of this work

Claude isn't Google. You don't search it — you **brief** it, like a sharp assistant on their first day. The more of your real situation you give it, the less generic the answer. Every prompt in this guide follows the same recipe: **who you are, what's actually going on, exactly what you want, and your limits**. Once you feel that pattern, you can write your own for anything.

THE HONESTY RULE

AI can be wrong, confidently. If being wrong costs you nothing — drafts, ideas, explanations — trust it and crack on. If being wrong costs money, health or legal trouble, **check it before you act**. Understand with Claude, verify with the source or a professional. I'll repeat this until you're sick of it.



FOUNDATION

Build your AI Brain

20 minutes, once. Makes everything else twice as good.

Biggest mistake I see: people open a fresh chat and explain their business from scratch every single time — or worse, don't explain it at all and wonder why the answers are generic. The fix is what I call your **AI Brain**: one page about your business that you write once and reuse forever.

Here's the prompt that builds it. Claude interviews you, then writes the page for you:

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

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I run a small business and I want to create a one-page "business brief" I can paste at the start of any AI chat so you always have my context. Ask me questions one at a time — about what the business does, who my customers are, how I make money, my prices, my tone when I write, and what eats most of my time. Then write the brief for me, tight enough to fit on one page.
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Save what it gives you in your Notes app. From now on, start any serious chat by pasting it in with the words "Here's my business brief" — then ask your actual question. The difference in answer quality is night and day.

TIP FROM ME

If you're on the paid Claude plan, make a Project called your business name and paste the brief into the Project's instructions. Then every chat in that Project knows your business automatically — no pasting. That one feature is most of what I set up on my paid Setup Days, and you can do it yourself right now.

Keep it honest, keep it current

Update the brief when prices change or you drop a service. A stale brain gives stale answers. I re-read mine on the first of the month — takes two minutes with a brew.



MONEY

Your accounts, in plain English

Works with Sage, Xero, QuickBooks exports — or a shoebox of numbers.

Most owners I meet can run a business brilliantly but have never once read their own accounts properly — because nobody ever explained them like a human. Claude will. Export last year's accounts (or profit & loss) as a PDF or spreadsheet, upload it with the paperclip, and use this:

● COPY THIS INTO CLAUDE — CHANGE THE BRACKETS

Here are my business accounts for last year. My business brief is above. Explain what these accounts actually say, like I'm smart but nobody's ever walked me through accounts before. Specifically: where did the money actually go, which work made me the most profit, what's quietly eating my margin, and what three questions should I be asking my accountant?

Then, monthly — export the month from Sage, Xero or QuickBooks and run this one. Ten minutes a month and you'll know your business better than most owners ever do:

● COPY THIS INTO CLAUDE — CHANGE THE BRACKETS

Here's this month's export from my accounts software. Compare it against what a normal month looks like for a business like mine, flag anything unusual (up or down), tell me who owes me money and how overdue they are, and give me the one number I should keep an eye on next month.

THE HONESTY RULE, DOUBLE

Claude explains your numbers — your accountant and HMRC decide what's true. Never file, claim or pay anything based on an AI answer without checking it. And never paste other people's personal financial details in.

TIP FROM ME

Walk into your accountant's next meeting with the three questions Claude gave you. Watch their face. That meeting stops being a lecture and starts being useful.



GETTING PAID

Quotes in 5 minutes, and chasing that writes itself

The two jobs that steal the most evenings.

The quote builder

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

My business brief is above. A customer wants a quote for: [describe the job in plain English – what, where, roughly how long]. My day rate / typical pricing is [your numbers]. Draft me a professional, itemised quote in my tone – clear about what's included and what isn't, with my payment terms of [e.g. 50% deposit, balance on completion]. Keep it to one page.

TIP FROM ME

Do this from the van, on your phone, while you're still outside the job. The quote lands with them before your competitor has driven home. Speed wins work.

The chase-up ladder — three levels of firm

You check the amounts. It does the awkwardness:

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

Invoice [number] for £[amount] was due on [date] and is now [X] days late. Write me three versions of a chase-up: 1) a friendly first nudge that assumes they just forgot, 2) a firmer second reminder mentioning the payment terms they agreed, 3) a final notice that stays professional but makes clear the next step is [late payment interest / paused work / small claims]. My tone: polite, direct, never sarcastic.

TIP FROM ME

Send level one the day after it's due, every time, no exceptions. The businesses that get paid fastest aren't the pushiest — they're the most consistent. Nobody's ever fallen out with me over a polite nudge.



ADMIN

The price-rise letter, and your inbox as a system

An hour to build. Hours back every week.

The price-rise letter nobody wants to write

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

I need to raise my prices by [X]% from [date] for existing customers. My brief is above. Write a short, warm letter that explains it without apologising or over-explaining – costs have risen, quality stays, here's the new rate, and I'd genuinely love to keep working with them.

First: get Claude to design your Gmail setup

Most business inboxes are just a pile. Labels and filters fix that, and you don't need to understand them — you need Claude to design them and then tell you where to click:

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

I run [your business] and my Gmail is a mess. Design me a simple label and filter system: no more than 6 labels, covering new enquiries, quotes sent, jobs booked, invoices/money, suppliers, and admin. Then give me exact step-by-step instructions for setting each label and filter up in Gmail on my phone, one at a time, assuming I've never touched Gmail settings.

Then: the drafting engine

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

My business brief is above. Here's an email I've received: [paste it]. Draft my reply. What I want to happen: [e.g. keep the job but push the date / say no without losing them / get paid without a row]. My tone: friendly, straight, no waffle. Give me two versions – one warmer, one firmer – and keep both short.

TIP FROM ME

You stay in charge of send. Claude does the typing; you do the deciding. Two-minute rule: if a reply's been sat in your head for more than two minutes, it goes through this prompt.

GROWTH

Outreach that doesn't feel slimy

New work from people who already half-know you.

Forget cold-messaging strangers — the money for a local business is in the people one step away: past customers, neighbours of jobs you've done, the trades who could refer you. Claude makes staying in touch effortless.

The past-customer message

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

My brief is above. Write a short, warm message to past customers I haven't spoken to in 6+ months. No fake urgency, no discount begging — just a genuine check-in that reminds them what I do, mentions I've got some availability coming up, and makes replying feel easy. Give me a WhatsApp version and an email version.

The review request that actually gets reviews

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

I've just finished a job for [name] and they were happy. Write me a short message asking for a Google review — friendly, zero pressure, one sentence about why it helps a small business, and include where the link will go. Make it feel like me, not a template.

TIP FROM ME

Send it the same day, while they're still delighted. A happy customer at 6pm is a review; the same customer next Tuesday is a good intention.

The referral nudge to other trades

● COPY THIS INTO CLAUDE – CHANGE THE BRACKETS

Write a message to [trade — e.g. a plumber I know] suggesting we send each other work when jobs overlap. Casual, specific about the kind of jobs I can pass them, and clear about what I do. No formal partnership talk — just two local businesses looking after each other.



LEVEL UP

Connectors — when Claude plugs into your actual tools

The step that turns “helpful” into “part of the business”.

Everything so far has been copy-and-paste. Connectors are the next level: with your permission, Claude can plug directly into tools you already use — Gmail, Google Calendar, Google Drive and more — and work with what's actually in them. Instead of pasting an email in, you ask: *“find the thread from Dave about the bathroom job and draft a reply.”* It goes and gets it.

What this looks like in real life

- “Summarise every enquiry that came into my inbox this week and tell me which ones I haven't replied to.”
- “Look at my calendar for the next fortnight and tell me where I can actually fit the Hendersons' job in.”
- “Find last year's insurance documents in my Drive and tell me the renewal date and what I'm actually covered for.”

How to switch them on

In Claude: **Settings** → **Connectors** → choose Gmail, Google Calendar or Google Drive → sign in and approve. Two minutes each. Start with one — Gmail is the one that pays for itself first — and add the rest when it feels normal.

PLAIN-ENGLISH SAFETY BIT

Connectors can see what's in the account you connect, so connect **business** accounts, not personal ones, and only connect what you'll actually use. You can disconnect any of them in the same settings screen at any time. And the golden rule still stands — Claude drafts and finds; you decide and send.

TIP FROM ME

This is genuinely the biggest thing I set up on my Setup Days, and there's no secret to it — the buttons are right there in settings. What people pay me for is doing it across the whole business in one day, wired into how they actually work, with the team trained. But you can absolutely start yourself, today, with Gmail.



MAKING IT STICK

The 10-line AI policy, and your first 30 days

One tea break for the policy. One month to make it a habit.

The 10-line policy — adopt it as-is if you like

- 01 AI drafts — a human reads everything before it leaves the business.
- 02 Customer personal details never get pasted into AI tools.
- 03 Passwords, bank details and anything under NDA — never.
- 04 Anything with legal, tax or safety consequences gets verified with the source or a professional.
- 05 If AI states a fact that matters, we check it before acting on it.
- 06 We connect business accounts only, and only the ones we use.
- 07 The person whose name is on it is responsible for it — "AI wrote it" is not a defence.
- 08 We tell customers honestly if they ask whether we use AI. We're not ashamed of working smart.
- 09 Anyone in the business can flag an AI answer that looks wrong — and gets thanked, not argued with.
- 10 We review this policy when the tools change, not once a year out of habit.

The 30-day plan — one task a day, that's the whole trick

WEEK 1 • STUFF THAT ANNOYS YOU

Build your AI Brain, run one email reply a day through the drafting engine, set up your Gmail labels.

WEEK 2 • STUFF THAT TAKES TOO LONG

Upload last year's accounts, run the monthly money check, do your first five-minute quote.

WEEK 3 • STUFF YOU AVOID

The chase-up ladder on every overdue invoice, the price-rise letter, one past-customer outreach session.

WEEK 4 • STUFF YOU THOUGHT YOU COULDN'T DO

Switch on the Gmail connector, ask it something you'd normally pay someone to answer, write one prompt of your own.

TIP FROM ME

Miss a day? Fine — life happens, I've missed plenty. **Never miss two.** Miss two and the habit dies. That's the only rule I hold myself to, and it's the one that got me from dropping a spoon to running a business.



NO PRESSURE

And if you'd rather have it done with you...

The honest pitch. One page, then I'll leave you alone.

Everything in this guide is doable on your own — that was the point of writing it. But some owners read it and think: *I can see it's worth it, and I also know I'll never find the hours.* That's who these are for.

The 1-Day AI Setup

£550

One full day in your business, or over video. Morning: we find where the hours and money are leaking. Afternoon: I build working Claude systems on your real work — quotes, inbox, accounts, connectors — in front of you. By the end you or a staff member can run all of it without me, and you keep a one-page cheat sheet built for your business. No retainer, no subscription. **Working by five o'clock, or the day is free.**

Website design & build

£497

Built from scratch, mobile-first, written to make your phone ring. Live on your domain in days and owned entirely by you. Optional hosting and care afterwards at £20 a month.

Missed-Call Rescue — for trades

£385

Setup, then £50 a month. Hands in a boiler? They get a text back in seconds instead of ringing the next name on Google. Your own business number, replies in one inbox, out-of-hours handled.

How to reach me — no booking systems, no phone tag

WhatsApp me on 07777 278337 — your name, what the business does, and what's eating your time. I work shifts, so you'll get a personal reply, usually a voicenote, within 24 hours. There's a reason my whole business runs on messages: I know what it's like to dread a ringing phone, and nobody who contacts me will ever be pushed into one. Or **hello@yourwaytoai.co.uk**, or the form at **yourwaytoai.co.uk**.

Either way — **free mini-audit first**. I'll tell you the two or three things I'd fix whether or not you ever hire me. And if I don't think a Setup Day would pay for itself in your business, I'll tell you that too.

Go and use the prompts. **Today, not tomorrow.** — Luke