

# Your Digital PA Build

Session Slides

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WebAi.Scot

*AI Augmented Web Development for SMEs globally*

# Pre-Build Technical Setup

Remote configuration session - before Session 1

# The Remote Setup Process

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## 60-90 minute remote session via Google Chrome Remote Desktop

You connect to the participant's machine and configure everything while they watch and ask questions.

**This is a setup session, not a teaching session.**

The participant learns by observing. The real education happens in Sessions 1 through 10.

*Scheduled at a time to suit each participant.*

# Google Cloud Console - Step by Step

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- 1 Create new Google Cloud project
- 2 Enable Gmail, Calendar, and Drive APIs
- 3 Configure OAuth consent screen (external user type)
- 4 Add scopes for Gmail, Calendar, and Drive
- 5 Create OAuth 2.0 client credentials (Desktop app)
- 6 Note Client ID and Client Secret
- 7 Set Redirect URI to `http://localhost:3000`

# MCP Server Configuration

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## What MCP Does

The MCP server connects Claude Desktop to Google Workspace. It is the bridge that lets Claude read your email, check your calendar, and access your files.

## Setup Steps

- Edit Claude Desktop config file
- Add MCP server entry with credentials
- Restart Claude Desktop
- Verify Gmail connection
- Verify Calendar connection
- Verify Drive connection

# Setup Checklist

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*Before closing the remote session, confirm:*

- Google Cloud project created and APIs enabled
- OAuth credentials configured and working
- MCP server installed and running
- Gmail connection verified with live test
- Calendar connection verified with live test
- Drive connection verified with live test
- Participant confirmation email sent

# Session 1

What Claude Actually Is

# The Ai Landscape

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## Claude is built by Anthropic

It is not the same as ChatGPT, Gemini, or Copilot. Designed to be helpful, harmless, and honest.

## For this build, we use Claude exclusively

Claude Chat for conversation. Claude Cowork for production. One tool, two modes.

**One tool.  
Two modes.  
Real work.**

# How Claude Processes Context

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## Claude reads your entire input at once

Not word by word. It weighs the importance of every word against every other word simultaneously.

## More context = better output

This is why we feed Claude your voice guide, your templates, your client files. The more it knows about you, the better it performs.

## The analogy

Asking Claude without context is like briefing a new employee with no background on your business. Asking with context is like briefing someone who has worked with you for years.

# Claude's Memory Model

## **Within a conversation**

Claude remembers everything said so far.

## **When you close and restart**

It remembers nothing. Clean slate every time.

## **Why Projects matter**

They give Claude persistent memory of your business.

# Subscription Tiers

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## Free

Free

Limited. Not suitable for business use.

## Pro

\$20/month

Access to Cowork but limited tokens. Good for getting started.

## Max

\$100/month

Full access. 20x Pro usage. This is what the build uses.

# Opus vs Sonnet

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## Sonnet

Fast. Good for daily tasks, emails, quick drafts.

Your everyday workhorse.

## Opus

More capable. Better at complex reasoning, longer documents, nuanced work.

For important deliverables.

# The Copy-Paste Workflow Problem

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## How most people use Ai

Open ChatGPT or Claude in a browser tab.  
Type a vague request. Copy the output.  
Paste it somewhere. Repeat.

No context. No memory. No connection to  
your actual work.

## What this build builds

A production system on your machine that  
knows your business, connects to your  
tools, and works while you do other things.

No copy-pasting. No context lost. No  
starting from scratch every time.

# Where Claude Needs You

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## **Claude excels at:**

Drafting, research synthesis, data analysis, document creation, workflow automation, handling repetitive tasks at speed.

## **Claude needs your judgement for:**

Final decisions, client relationships, strategic direction, emotional nuance, anything where being wrong has real consequences.

## **The principle:**

Claude produces. You direct, review, and decide. That division of labour is what makes a one-person business operate like a team.

# Why Claude Max Is Required

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## Every action Claude takes uses tokens

Reading files, running background tasks, connecting to tools, using sub-agents - all of it consumes tokens. The build teaches you to run Claude as a production system, and that level of use burns through tokens quickly.

**Pro will hit its limits within days of working this way.**

Max standard tier (roughly £90/month): 5x Pro capacity. [Start here.](#)

Max top tier (roughly £180/month): 20x Pro capacity. Upgrade only if you hit limits regularly.

# Session 2

Your Voice, Claude's Output

# The Voice Guide Template

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**1**

**How My Business Sounds**

**2**

**Words I Use and Words I Avoid**

**3**

**How I Structure My Writing**

**4**

**Examples of My Best Work**

**5**

**What I Never Want to See**

# Before and After

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## Without a voice guide

Generic, corporate-sounding output that could be anyone's.

Every email sounds like it was written by committee.

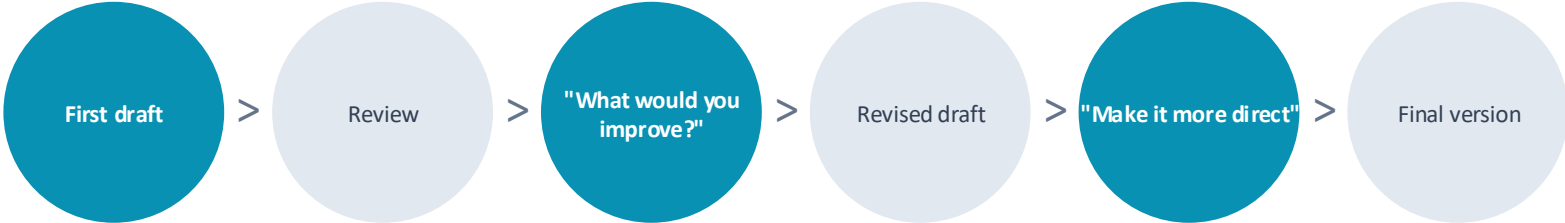
## With a voice guide

Output that sounds like you wrote it on your best day.

Clients cannot tell the difference.

# The Iteration Loop

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*Claude's first answer is a starting point. The skill is knowing how to push it further.*

# Research and Verification

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## What Claude knows reliably

General knowledge, writing patterns, document structure, reasoning through complex problems, synthesising information you provide.

## What Claude hallucinates

Specific facts, statistics, URLs, recent events, legal or financial details. Claude generates plausible text, not verified facts.

Build the verification habit: check claims before they reach a client.

# Writing vs Thinking

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## Ask Claude to write

When you need a draft, an email, a proposal, content - something that goes directly to the audience.

Claude produces polished output in your voice.

## Ask Claude to think

When you need to reason through a problem, weigh options, spot gaps, or plan strategy.

Claude becomes a thinking partner, not a typist.

# Structuring Complex Tasks

1

## Stage 1

Research and gather context

2

## Stage 2

Analyse and identify patterns

3

## Stage 3

Draft the output

4

## Stage 4

Review and refine

*Breaking complex tasks into stages produces better results than one giant prompt.*

# Session 3

Claude Desktop and Cowork

# Cowork vs Chat

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## Claude Chat

A conversation in a browser tab.

Good for quick questions.

No file access, no tools, no automation.

## Claude Cowork

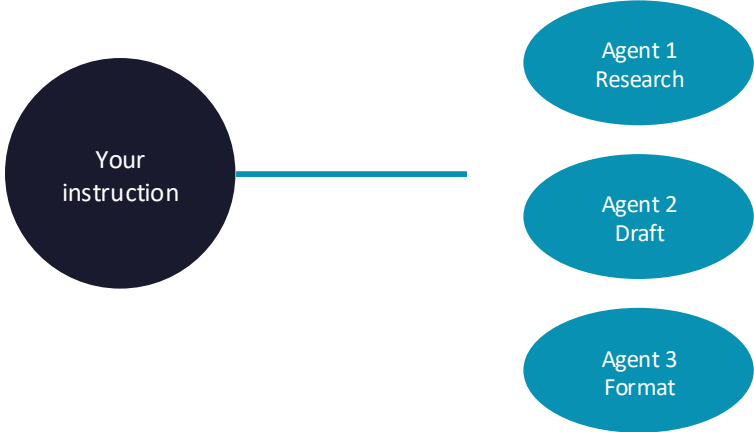
A production environment on your desktop.

Runs background tasks, connects to your tools, works while you do other things.

This is what we build on.

# Sub-Agents Explained

One instruction splits into three parallel workers



They run independently and report back when done.  
Three hours of work in 20 minutes.

# Built-in Skills

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PDF

Read, create, merge,  
fill forms

DOCX

Professional Word  
documents

PPTX

Presentation decks

XLSX

Spreadsheets and  
data analysis

*Claude handles the file format. You focus on the content.*

# The Skill Creator

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## Build custom workflows without writing code

The Skill Creator lets you build a custom skill for any task you repeat regularly.

You describe what you need. Claude interviews you about the specifics. Claude generates the skill file. You test it and refine it.

*We will build custom skills in Session 5. For now, know that any workflow you repeat more than twice can become a one-command skill.*

# The Morning Dispatch Concept

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## The rhythm of a properly configured system

**Assign tasks. Step away. Review outputs.**

This is where everything we build across the build leads: a morning routine where you give 30 minutes of direction and Claude produces a full day of output.

*We will build this fully in Session 9. Keep this model in mind as we add each layer.*

# Research Preview - What to Know

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## **Cowork is currently in research preview. This means:**

- Features are actively improving - what you see today will be better in a month.
- Some tasks may fail or produce unexpected results - this is normal.
- Usage limits exist even on Max during heavy sessions.
- Not every feature works perfectly every time.

*This is not a polished consumer product yet. It is a powerful production tool with rough edges. Knowing the constraints helps you work within them effectively.*

# Session 4

Projects, Folders, and Memory

# The Four-Folder Architecture



## Identity

Who you are. Rarely changes. Voice guide, business description, brand standards.



## Templates

How you produce. Proposals, emails, briefs - anything you produce more than twice.



## Active Work

What you are doing now. Changes daily. Current client tasks and projects.



## Outputs

What Claude has produced. Your audit trail of completed work.

# Project Inheritance

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## **Global instructions apply to everything**

Like a company handbook that every employee reads.

## **Project instructions apply to that project only**

Like a project brief for a specific job.

## **Claude reads global first, then project-specific**

The specific instructions override the general ones when they conflict. This is how you keep control without repeating yourself.

# Why Projects Eliminate Context Bleeding

## Without Projects

Everything in one conversation. A client brief from one job accidentally appears in another. Claude mixes up contexts. Your outputs are unpredictable.

## With Projects

Each Project has its own files, instructions, and conversation history. Client A never bleeds into Client B. Your outputs are consistent and reliable.

# Session 5

Global Instructions and Custom Skills

# What Good Instructions Contain

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## **Identity**

Who you are and what you do

## **Tone**

How you communicate

## **Output format**

What your deliverables look like

## **Quality standards**

What good enough means

## **Hard rules**

Things Claude must never do

# The Instructions Hierarchy

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## Global instructions

Apply to every task in every Project. Your identity, tone, and universal rules.

## Project instructions

Apply to that Project only. Client-specific rules, project-specific formats.

## Task instructions

Apply to this task only. What you type in the conversation.

*More specific instructions override more general ones. This is how you keep control.*

# Good vs Bad Instructions

## Bad

*"Be professional"*

Too vague. Means nothing.

*A 2,000-word essay covering every scenario*

Too long. Claude loses focus.

## Good

*"Write in British English. Use short sentences. No jargon."*

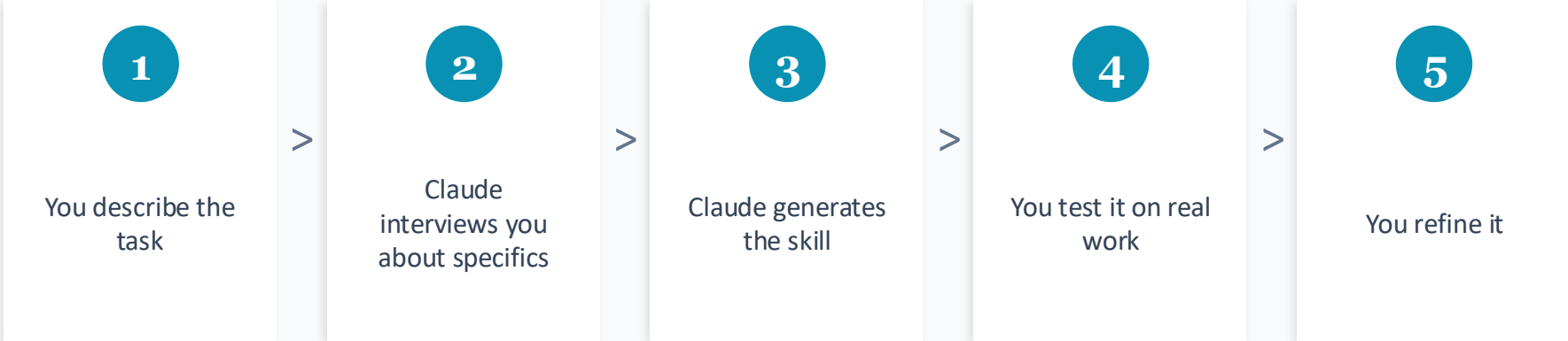
Specific. Actionable. Testable.

*Under 500 words, covering the essentials*

Short enough to read, detailed enough to matter.

# The Skill Creator Workflow

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# Session 6

Putting Your Integrations to Work

# Your Connected System

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**Gmail**

**Drive**

**Claude  
Cowork**

**Calendar**

**More...**

# Google Workspace - What Each Tool Does

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## Gmail

Search your inbox, read messages, draft replies. Never sends without your approval.

## Calendar

Read events, find free time, create invitations. Cross-reference with email for meeting prep.

## Drive

Search files, read documents, use your content as live context for any task.

*All configured during your pre-build setup. Today we put them to work.*

# The Human-in-the-Loop Principle

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1

Claude reads your  
inbox

2

Claude drafts a  
reply

3

You review and  
approve

4

Only then it sends

*Claude never acts without your approval. This is a safety feature, not a limitation.*

# Vague vs Specific Instructions

## Vague

"Check my email"

Result: A generic summary of your inbox.  
Useful but not powerful.

## Specific

"Search Gmail for client emails this week mentioning deadlines. Summarise each with action needed and create a prioritised list."

Result: An actionable briefing.

# The Compound Effect

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## Gmail + Calendar + Drive working together

*"Check my inbox for meeting confirmations this week, cross-reference with my calendar, and create a preparation document in Drive for each meeting with attendee context and suggested talking points."*

Each connector on its own is useful.

**But the real power is when they work together.**

*Like having an assistant who can check your email, look at your diary, and prepare your documents - all at once, without you asking three separate times.*

# Google Drive as Live Context

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## **The connector most solopreneurs underestimate**

Claude reading your project briefs, client history, and proposal templates before writing anything.

Ask Claude to find a specific document in your Drive and use it as context for a new piece of work - a follow-up email, a status update, or a proposal outline.

*This is where the compound effect becomes real. Your Drive is not just storage - it is Claude's reference library.*

# Session 7

Plugins and Workflow Automation

# What a Plugin Is

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## A plugin bundles everything into one package

- Skills** Specialist capabilities for specific file types or tasks
- Connectors** Links to external tools (Gmail, Calendar, CRM)
- Slash commands** One-word triggers for complex workflows
- Sub-agents** Parallel workers that handle parts of the task independently

*A plugin is a pre-configured workflow, not just a tool.*

# The Plugin Ecosystem



## Productivity

Daily workflows, task management, morning briefings



## Sales

Pipeline tracking, outreach drafting, call prep



## Marketing

Content creation, campaign planning, SEO analysis

*Plugins add specialist capabilities on top of your base system.*

# Installing Your First Plugin

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1

Open the plugin installer

2

Select Productivity

3

Configure for your Google Workspace connectors

4

Run the `/start` command

5

Try the daily briefing

*This single plugin replaces 30 minutes of morning admin.*

# Daily Briefing in Action

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1

**Inbox  
summary**

with priority flags

2

**Today's  
calendar**

with preparation  
notes

3

**Outstanding  
tasks**

from yesterday

4

**Suggested  
priorities**

for today

*All from one command, using your real data.*

# The Plugin Creator

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## Build a custom plugin from scratch

- 1 Name it and define its purpose
- 2 Specify the slash command that triggers it
- 3 Map the connectors it needs (Gmail, Calendar, etc.)
- 4 Set the sub-agent instructions
- 5 Test on real work and refine

# Evaluating a Plugin Before Installing

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## Before installing any plugin, check:

- Read the YAML configuration file - it shows exactly what the plugin does and what it connects to.
- Check which connectors it requires - do you have them active?
- Review the slash commands - do they match your actual workflow?
- Look at what sub-agents it deploys - are they doing what you need?

*The plugin ecosystem grows rapidly. Review new additions quarterly. Not every plugin is relevant to your business - evaluate before installing.*

# Session 8

Expanding the Stack and MCP

# Your Expanding System

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**You already have Google Workspace connected via MCP.**

Today we add more tools: Notion, Slack, HubSpot, Asana, Stripe, and others.

*The foundation is already in place. We are building on it, not starting from scratch.*

# What MCP Is

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## Model Context Protocol

How Claude talks to external tools.

You already have one running - it powers your Google Workspace connections.

If a tool has an MCP server, Claude can talk to it directly.

## The Analogy

MCP is like a universal adapter for travel.

You already have one plugged in for Google.

Today we add adapters for whatever other tools your business runs on.

# Official First-Party MCP Servers

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**Built by the platforms themselves - confirmed March 2026**

**Notion | Slack | HubSpot | GitHub | Figma | Asana | Stripe | Atlassian  
(Jira/Confluence) | Google Workspace CLI | Canva | Box | Linear | MongoDB**

*If a tool you use has an MCP server on this list, you can add it to your existing configuration. One edit to the config file, one restart of Claude Desktop.*

# The Decision Framework

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## **Is the tool in the Connectors Directory?**

Yes: Use the built-in connector. Simplest option.

## **Does it have an official MCP server?**

Yes: Add to your existing config. One edit, one restart.

## **Neither?**

Use Zapier MCP (8,000+ integrations) or Composio (500+, free tier).

# Quick Reference Card

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## Your one-page system summary

- Subscription tier and model preferences
- Connected tools and how to trigger each
- Active projects and their purposes
- Custom skills and slash commands
- Scheduled tasks and their frequency

*Keep this updated. It is your system documentation.*

# Session 9

Scheduled Tasks, Dispatch, and Morning Workflow

# The /schedule Command

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## How scheduled tasks work

Each scheduled task runs in its own Cowork session with full access to connectors, skills, and plugins.

**The computer must be awake and Claude Desktop must be open.**

If the machine is asleep when a task is due, it waits until the machine wakes up.

*Set up with /schedule in any Cowork conversation. Options include daily, weekly, and custom recurring patterns.*

# The Six Most Valuable Scheduled Tasks

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1

Daily inbox summary - 8am every morning

2

Weekly calendar preview - Monday 7am

3

Monthly client check-in reminders

4

Weekly project status roundup

5

Daily social media content queue

6

Weekly financial summary

*Set them up once. They run without you thinking about it.*

# The Morning Dispatch Workflow

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8:00am	Open Cowork and review Projects
8:10am	Assign 3-5 tasks across active work
8:20am	Instruct parallel sub-agents
8:30am	Step away
All day	Review outputs as they complete

***30 minutes of direction producing a full day of output.***

# Keep Your Machine Awake

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*The single most common support question - prevent it here.*

1

## **Sleep settings**

Prevent sleep when lid is open

2

## **Claude Desktop**

Set to launch at startup

3

## **Power settings**

Confirmed and tested

# Dispatch

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## How It Works

- Install Claude mobile app
- Pair via QR code
- Send tasks from your phone
- Tasks execute on your desktop

## Honest Limitations

- Desktop must be awake
- No completion notifications yet
- One thread at a time
- Reliability still improving

# The Task Queue Habit

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**Capture work throughout the day so tomorrow's dispatch is ready**

## **One note**

Jot down the task when it occurs to you

## **One voice memo**

Speak it into your phone between meetings

## **One Dispatch message**

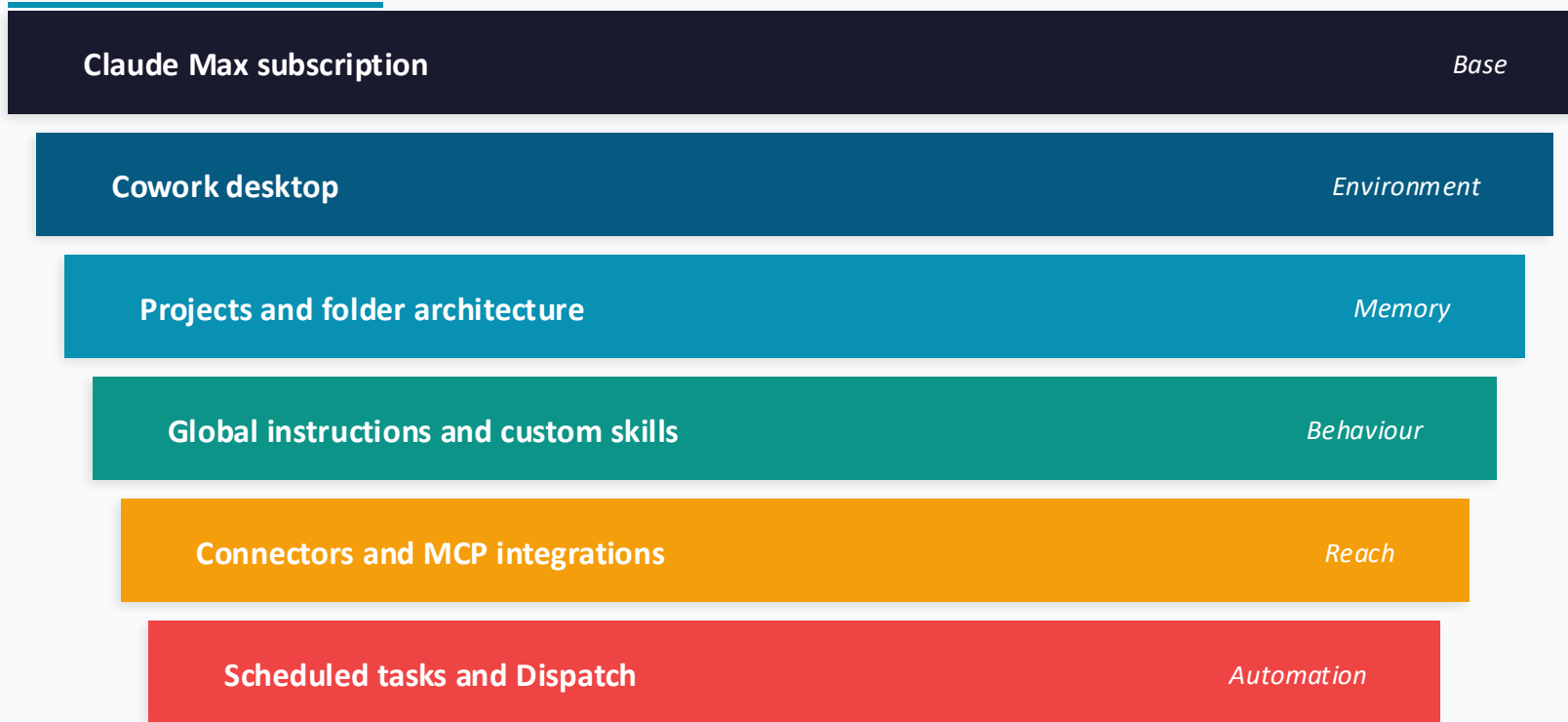
Send it from your phone directly to your queue

*The goal: never start a morning dispatch wondering what to assign.*

# Session 10

Review, Refinement, and What Comes Next

# The Six-Component Stack



*Each layer builds on the one below.*

# The Four-Step Diagnostic

1

## Check the instructions

Are they clear and specific?

2

## Check the connector

Is it still authenticated?

3

## Check the task brief

Did you give enough context?

4

## Check the tool

Is the external service actually working?

*Work through these in order. The problem is almost always in steps 1 or 3.*

# What Cowork Cannot Do Yet

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## Honest limitations you need to know

- Dispatch reliability is still improving - approximately 50/50 in early builds.
- Usage limits exist even on Max during heavy sessions.
- No cloud sync for Projects - your files live on your machine only.
- No collaboration features - this is a single-user production system.

*These are real constraints, not excuses. They will improve. Knowing them helps you plan around them.*

# The Gap Ai Does Not Close

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## Where human judgement remains irreplaceable:

Client relationships - reading the room, building trust, knowing when to push and when to hold back.

Strategic direction - deciding what to build, who to serve, where to invest your time.

Emotional nuance - the things that cannot be templated or automated.

*This is not a limitation. This is the point. Ai handles the production so you can focus on the work that only you can do.*

# Staying Current

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**Anthropic ships updates regularly. Your system grows with them.**

## **Weekly**

Check Anthropic release notes at [support.claude.com](https://support.claude.com) every Monday morning

## **Monthly**

Full system review - update instructions, check connectors, refine skills

## **Quarterly**

Review new plugins and connectors. Add what is relevant, ignore what is not

# What Comes Next

## This month

Maintain and refine. Use the system daily. Note what works and what needs adjusting.

## Next quarter

Expand and connect. Add new tools, create new skills, automate more.

## This year

Evolve with the platform. Anthropic ships updates regularly. Your system grows with them.

# Your foundation is solid.

Now make it yours.

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