

# AI Quick Start Guide

Your take home reference for ChatGPT & Claude

**What is AI?** Artificial intelligence assistants such as ChatGPT and Claude are language models trained on extensive collections of books, articles, and other published material. Rather than searching the web on demand, they generate responses from patterns learned during training, producing fluent answers across virtually any topic. They are especially effective for **writing, summarizing, analyzing, planning, and brainstorming**. Because they can occasionally produce inaccurate or incomplete information, every response should be reviewed before use.

## 1

### THE 5 PROMPTING PRINCIPLES — USE THESE EVERY TIME

#### BE SPECIFIC

Vague questions = vague answers. Detail in, quality out.

✗ "Help me with email"

✓ "Write a professional email to a client about a late \$500 invoice due Friday."

#### GIVE IT A ROLE

Start with "You are a..." — personas boost performance.

✗ "Tell me about Bitcoin"

✓ "You are an expert crypto educator. Explain Bitcoin to a beginner in 3 short paragraphs."

#### PROVIDE CONTEXT

Paste in the source material, examples, or background data AI needs.

✗ "Summarize this article"

✓ "Here is the article: [paste full text]. Summarize the 3 biggest takeaways for a business audience."

#### ITERATE & REFINE

Your first response is rarely your best. Reply and improve.

✗ Just accepting the first answer

✓ "Make this shorter, more conversational, and add two concrete examples."

#### REVIEW EVERYTHING

Treat output like a smart intern's first draft. You're the editor.

✗ Copy pasting AI output without reading it

✓ Read carefully, fact check anything important, and edit before sending.

## 2

## TOP 10 EVERYDAY USE CASES

### Writing

Emails, letters, social posts, blog drafts, cover letters, thank you notes.

### Summarizing

Paste any long article, document, or transcript and ask for a quick summary.

### Planning

Trip planning, event agendas, business plans, daily schedules, meal plans.

### Research

Compare options, weigh pros & cons, get a balanced overview of any topic.

### Learning

Explain any concept, build a study plan, or quiz yourself on any subject.

### Brainstorming

Business names, marketing angles, gift ideas, creative solutions to problems.

### Editing

Paste your own writing — ask AI to improve tone, grammar, or clarity.

### Coding Help

Even non coders can get spreadsheet formulas, simple scripts, and debugging help.

### Customer Scripts

Responses to common questions, complaint handling, follow up messages.

### Crypto Research

Analyze projects, summarize whitepapers, spot red flags, compare tokenomics.

## 3

## COPY PASTE PROMPT TEMPLATES — START HERE

### Write an email

You are a professional business writer. Write a [formal/friendly] email to [PERSON] about [TOPIC]. Keep it under [LENGTH]. Tone: [TONE].

### Explain something simply

You are an expert teacher. Explain [TOPIC] to a complete beginner in [3 sentences / simple terms / an analogy]. Avoid jargon.

### Summarize a document

Summarize the following text in [3 bullet points / 1 paragraph / under 100 words]. Focus on the most important points: [PASTE TEXT]

### Brainstorm ideas

Give me [10] ideas for [TOPIC]. Be creative. For each idea, give a one sentence explanation of why it works.

### Improve my writing

Improve the following text. Make it [clearer / more professional / shorter / more engaging]. Keep my original meaning: [PASTE YOUR TEXT]

### Research a topic

You are a research analyst. Give me a balanced overview of [TOPIC] including: key facts, main benefits, main risks, and your overall assessment.

### Plan something

Create a [day by day / step by step / hour by hour] plan for [GOAL]. I have [TIME AVAILABLE] and [RESOURCES/BUDGET].

### Crypto research

You are an expert crypto analyst. Analyze [PROJECT NAME] covering: what it does, tokenomics, main risks, competition, and your overall assessment. Be honest — no hype.

## 4

## THE TWO TOOLS YOU NEED TO KNOW

### ChatGPT

by OpenAI

[chat.openai.com](https://chat.openai.com)

- ✓ Free tier available (GPT-4o)
- ✓ Image generation (DALL-E)
- ✓ Code interpreter built in
- ✓ Largest user base — most plugins

*Best for: General tasks, image creation, broad use cases.*

### Claude

by Anthropic

[claude.ai](https://claude.ai)

- ✓ Free tier available (Claude Sonnet)
- ✓ Longer context — handles big documents
- ✓ Better at nuanced writing & analysis
- ✓ Safer, more cautious responses

*Best for: Long documents, writing, detailed analysis, crypto research.*

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## AI SAFETY — WHAT NEVER TO SHARE

### NEVER put these in AI:

- Social Security or government ID numbers
- Bank account or credit card numbers
- Crypto seed phrases or private keys — EVER
- Passwords or security codes
- Confidential business contracts or client data
- Private medical information you wouldn't share publicly

### ALWAYS remember:

- Disable chat history in settings if using a shared device
- Treat sensitive topics as if they could be seen publicly
- Use a personal email to create your accounts
- Verify important facts — AI can be confidently wrong

## 6

## HOW TO DISABLE CHAT HISTORY

### ChatGPT

Settings → Data Controls → “Improve the model for everyone” → OFF

### Claude

Settings → Privacy → Memory → OFF

### POWER USER TIPS

**Use voice input.** Most AI apps accept spoken prompts. Talk naturally on your phone.

**Build a prompt library.** Save the prompts that work in a doc so you never start over.

**Upload your files.** Both accept PDFs, spreadsheets, and images for direct analysis.

**Ask for sources.** Tell AI to cite where information came from to catch errors.

## 7

## BRAD'S CHALLENGE — USE AI EVERY DAY THIS WEEK

- Day 1:** Write an email you've been putting off.
- Day 2:** Summarize something you've been meaning to read.
- Day 3:** Brainstorm something for work or a project.
- Day 4:** Ask AI to explain something you've always wondered about.
- Day 5:** Research any topic that interests you — then verify one fact.

## 8

## MORE RESOURCES — TOOLS, PLUGINS & SKILLS

### FREE TOOLS

- Perplexity** — AI search with sourced answers and citations.
- NotebookLM** — Upload documents and get a custom research assistant.
- Google Gemini** — Google's assistant, integrated across Workspace.
- Microsoft Copilot** — Free assistant built into Edge, Bing, and Windows.
- Otter.ai** — Automatic meeting transcripts and summaries.
- Canva AI** — Design and copy tools included in every Canva account.

### PLUGINS & GPTs

- GPT Store** — Thousands of specialized assistants inside ChatGPT.
- Code Interpreter** — Native data analysis and code execution in ChatGPT.
- Image Generator** — DALL-E image creation built into ChatGPT.
- Canva GPT** — Generate branded design concepts from a prompt.
- Wolfram** — Adds advanced math, computation, and scientific data.
- Claude Connectors** — Link Claude to Google Drive, Figma, and other apps.

### CLAUDE AGENT SKILLS

- Excel Skill** — Claude builds complete spreadsheets with live formulas.
- PowerPoint Skill** — Generate full presentation decks from a brief.
- Word Skill** — Draft and edit polished documents with formatting.
- PDF Skill** — Read, fill, and create professional PDFs.
- Custom Skills** — Upload your own workflows for repeatable tasks.
- Availability** — Included on Pro, Max, Team, and Enterprise plans.