

Background Questions

Everything Claude needs to know about your business, before your first session.

Your answers become the context files that sit inside your Claude workspace, so Claude opens already knowing your business.

Don't polish anything. We want how you actually talk, not marketing copy. Skip anything that doesn't apply. Attachments beat descriptions: a real proposal or a few sent emails teach Claude more than anything you can write about your tone.

1. Your business

1. **What does your business do?** Say it the way you would to someone at a barbecue, not the way it reads on your website.
2. **Trading name, legal entity name, ABN, and where you are based.**
3. **How did the business start, and who founded it?** The version you actually tell people. Origin stories carry more weight than credentials.
4. **Why do people choose you over your competitors?** Be specific. "Better service" tells us nothing.
5. **What do you believe about your industry that most of your competitors do not?**

2. What you sell

6. **Describe your services.** Do you have set packages, or is every job a tailored quote?
7. **Walk us through how you deliver the work, from first enquiry to finished job.** The stages, roughly how long each takes, and who is involved.
8. **Where do your prices start?**

3. Who you sell to

9. **Describe your ideal client.** Industry, size, location, and the job title of the person who signs off.
10. **What problem are they trying to solve when they come to you?** In their words, not yours.
11. **What are they worried about before they say yes?** The objections you hear over and over.
12. **Who is a bad fit for you?** The clients you regret taking on, and what they had in common.
13. **Where do your leads come from today?** Referrals, ads, LinkedIn, events, inbound, outbound. Roughly what share from each.
14. **Who are your main competitors, and how do you describe the difference?**

4. How you sound

You can leave most of this to us. We'll have Claude read through your sent emails and your website to learn how you actually write, so you don't have to describe your own tone.

15. **Anything you would like to add about how you sound.** Optional. A phrase you always use, the line you open calls with, how you want to come across.

16. **Words or phrases you never want Claude to use.**

5. Proof

17. **Your best client results, with numbers if you have them.**

18. **Testimonials, or client names you are allowed to use publicly.**

When you are done