

The Only Claude AI Cheat Sheet You'll Ever Need

Platforms · Models · Projects · Memory · Skills · Connectors · Prompts

PLATFORMS	PROJECTS — YOUR BUSINESS WORKSPACES	SKILLS — REUSABLE INSTRUCTION SETS
Claude Web — claude.ai in your browser	Persistent spaces where Claude remembers files and instructions across all conversations.	Build once, saved forever. Skills activate automatically based on context.
Claude Desktop App — Mac & Windows		
Claude Mobile — iOS & Android	Projects every contractor needs:	• Email Writer — matches your tone & CTA
Claude Code — terminal / CLI tool	• Sales & Follow-Up — templates, call summaries, follow-up scripts	• SOP Builder — turns conversations into step-by-step docs
Claude in Chrome — browser extension	• Marketing — social posts, newsletters, video scripts	• Estimate Creator — writes in your template & voice
MODELS — WHICH TO USE WHEN	• Operations & SOPs — checklists, tracking, call analysis, coaching	• Review Responder — crafts Google review replies
Opus 4.0 — Most powerful	• HR & Hiring — job descriptions, interview questions, handbook	• Field Report — fills your template with job details
Complex reasoning, long documents, legal & technical work.	THE CONTEXT FILE — MOST IMPORTANT STEP	<i>How: Settings > Skills > Skill Creator</i>
Sonnet 4.0 — Best balance	A document in your Project that tells Claude who you are and how you work.	CONNECTORS — LINK CLAUDE TO YOUR TOOLS
Strategy, content creation, analysis, writing.		Built-in integrations. 30+ available.
Haiku — Fastest	• Company structure, services, team size & roles	• Google Drive — access docs & contracts on demand
Quick answers, short replies, summaries.	• CRM platform (ServiceTitan, Jobber, etc.) & revenue range	• Gmail — draft replies, flag urgent leads
GETTING STARTED IN 15 MIN	• Communication style & brand voice	• Google Calendar — check availability & reschedule
• Go to claude.ai or download the desktop app	• Top customer objections	• Slack / Teams — update team, send notes
• Create a free Anthropic account	<i>One Context File beats 100 individual prompts.</i>	• HubSpot / Salesforce — pull data, log tasks & notes
• Upgrade to Pro (\$20/mo) for full features	MEMORY	• Microsoft 365 — Outlook, OneDrive, SharePoint, Excel
• Turn on Memory — Settings > Memory	• Personal Memory — Turn on in Settings. Learns your writing style, preferences & business details.	• Zapier — triggers & automation workflows
• Create a Context File for your business	• Project Memory — Add files & instructions inside each Project.	<i>How: Desktop App > paid plan > Browse > Connect</i>
• Upload it to your first Project	<i>The more you use Claude, the less you have to repeat yourself.</i>	SCHEDULING — AI ON AUTOPILOT
• Connect Google Drive & Gmail	COWORK — DELEGATE REAL TASKS	• Monday AM — summarize last week's call transcripts
	Claude accesses local files and works in the background.	• Wednesday — create social posts for the week
	• Organize folders & sort documents	• Friday PM — generate 5 customer follow-up drafts
	• Build reports from CRMs & spreadsheets	• Daily — review leads & flag outstanding emails
	• Write and send emails & calendar invites	DISPATCH — REMOTE CONTROL
	<i>Requires: Desktop App + paid plan</i>	Start tasks from your phone; Claude runs them on your desktop.
		• Trigger research from a job site
		• Launch content workflow during your commute
		<i>Come back and everything's done.</i>

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Claude AI Cheat Sheet — continued

<h3>PROMPTING TECHNIQUES</h3> <ul style="list-style-type: none"> • Be Specific — name the task, format, and outcome • Give Examples — paste your best email, say "match this tone" • Assign Roles — "Act as a senior HVAC manager reviewing these calls" • Chain Steps — "First analyze, then rank, then write an outline" • Use Templates — paste a template, ask Claude to fill it • Never start with "Hope this finds you well" 	<h3>BUILT-IN OUTPUT FORMATS</h3> <ul style="list-style-type: none"> • Artifacts — charts, visuals & documents created inline • Word Docs (DOCX) — reports, letters, proposals • Spreadsheets (XLSX) — data with formulas & charts • PDFs — polished, formatted, ready to send • Presentations (PPTX) — slide decks with content • React / HTML — interactive charts & widgets • Workbooks — formatted text with headers & lists 	<h3>PROMPTS TO USE EVERY WEEK</h3> <ul style="list-style-type: none"> • "Summarize my week's calls and tell me what to improve" • "Write 5 social posts based on this job story: [paste]" • "Turn this estimate into a formal proposal" • "Draft a check-in email to all open leads from last month" • "Create an SOP from this voice memo transcript" • "Review this contract and flag anything unusual" • "Write a job post for a lead technician using our culture and pay: [paste details]"
<h3>COPY-PASTE PROMPTS FOR CONTRACTORS</h3> <p>Follow-Up Email:</p> <p>"I have a transcript of a sales call with a homeowner who didn't book. Write a warm follow-up addressing their objections with a soft CTA to rebook. Match this tone: [paste example]"</p> <p>SOP Creation:</p> <p>"Here's a transcript of me explaining our install process. Turn it into a professional SOP with numbered steps, required tools, and safety checkpoints."</p> <p>Call Analysis:</p> <p>"Score these 11 call transcripts 1–10 on greeting, objection handling, upsells, and booking urgency. Flag the top 3 needing coaching."</p> <p>Review Response:</p> <p>"Draft a professional reply to this 2-star Google review. Acknowledge the issue, explain what changed, and invite them to call me."</p> <p>Content Batch:</p> <p>"I run an HVAC company in [City]. Write 5 LinkedIn posts about common AC problems homeowners face in summer. Match this voice: [paste example]"</p>	<h3>CLAUDE vs CHATGPT</h3> <p>ChatGPT wins at:</p> <ul style="list-style-type: none"> • Image generation & voice mode • Web browsing & real-time search • Quick brainstorming & short creative tasks • Plugin ecosystem & custom GPTs <p><i>Best for: speed, visuals, everyday tasks</i></p> <p>Claude wins at:</p> <ul style="list-style-type: none"> • Long documents & complex analysis • Following multi-step instructions precisely • Brand voice & consistent tone • SOPs, call analysis & operations • Nuanced reasoning & high-stakes writing <p><i>Best for: depth, operations, mission-critical work</i></p>	<h3>SKILLS CONTRACTORS SHOULD BUILD FIRST</h3> <ul style="list-style-type: none"> • Estimate Reviewer — checks estimates for completeness & pricing • Onboarding Guide Creator — builds new hire materials from your process • Meeting Summarizer — turns recordings into action items • Lead Qualifier — scores inbound leads by fit and urgency • Weekly Report Builder — compiles KPIs into a formatted summary
	<h3>TOOLS THAT PAIR WITH CLAUDE</h3> <ul style="list-style-type: none"> • ServiceTitan — job management, dispatching, invoicing • HighLevel — CRM, pipeline, SMS & email marketing • Zapier — connect systems, automate triggers • n8n — advanced conditional workflows • Calendly — scheduling & client booking • ChatGPT — images, voice & quick creative • Runway — AI video creation • Opus Clip — podcast-to-video clips 	<h3>CLAUDE PLAN COMPARISON</h3> <p>Free — claude.ai, limited messages, no Projects</p> <p>Pro (\$20/mo) — extended context, Projects, Priority access</p> <p>Max (\$100/mo) — highest limits, all features</p> <p>Team (\$25–30/user) — shared Projects, admin controls</p> <p>Enterprise — custom contracts, SSO, advanced security</p> <p><i>Most contractors start with Pro and upgrade as workflows scale.</i></p> <h3>REMEMBER</h3> <ul style="list-style-type: none"> • Claude is a thinking partner, not a magic wand — give it context • The better your Context File, the better every response • Build one Project at a time, don't try to do everything at once <p><i>Start small. Build habits. Then scale.</i></p>

Claude is built by Anthropic. Features vary by plan. Always verify AI outputs before using in client-facing or legal work.