

BUILD · WITH · NAV

A BUILD WITH NAV PREMIUM GUIDE

YOUR FIRST 7 DAYS WITH CLAUDE.

The non-technical founder's blueprint to build, monetize, and scale.

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WHY CLAUDE IS YOUR NEW CHIEF OPERATING OFFICER

INTRODUCTION

Most business owners treat AI like a novelty search engine. They ask a basic question, receive a generic answer, and conclude AI cannot handle the complexity of their business.

The truth is, you do not have an AI problem. You have a delegation problem.

This guide takes you from complete beginner to having a fully operational, context-aware virtual Chief Operating Officer in exactly seven days. By implementing this step-by-step system, you will buy back at least 10 to 15 hours of your time every single week, write marketing copy that actually converts, and build an automated operational system that scales with your business.

To complete this guide successfully, we highly recommend upgrading to **Claude Pro (\$20/month)**. The advanced features we deploy (Projects, official Connectors, and Scheduled Tasks) are premium capabilities that yield an immediate, massive return on investment.

THE MONETIZATION MATRIX

Use this table to track how each day's setup contributes to your bottom line, saves billable hours, and builds enterprise value.

DAY	PILLAR	STRATEGIC FOCUS	COST / TIME SAVED	MONETIZATION	SCALING VALUE
01	BUILD	Executive setup & first win	2-3 hrs / week of admin friction	Capacity for 1 extra high-ticket client	Baseline AI literacy in leadership
02	BUILD	Your digital boardroom	5 hrs of context-setting / week	Sales proposals in 5 min, not 2 hrs	Centralized institutional knowledge
03	MONETIZE	Cloning your brand voice	\$1,500/mo in copywriting fees	High-converting pages and emails	Brand consistency across all channels
04	SCALE	Streamlining communications	10 hrs / week of inbox triage	Hot lead replies in 3 min, not hours	Standardized customer service
05	MONETIZE	The virtual COO (data)	\$5,000+ in consulting fees	Surface underpriced offers, fix pricing	Rapid, data-driven pivots
06	SCALE	Operations on autopilot	3 hrs / week of planning	Pitch timely, relevant offers	Operator becomes strategic director
07	SCALE	Custom skills & AI SOPs	15+ hrs / week of team training	Package SOPs as B2B consulting	Asset-backed, acquisition-ready

DAY

PILLAR: BUILD

1

EXECUTIVE SETUP & YOUR FIRST VICTORY

The business why

Before you delegate complex tasks to an assistant, you set up their office. Today is about establishing your workspace and getting an immediate quick win to prove the value of the tool.

Step-by-step walkthrough

1. **Create your account.** Go to Claude.ai and sign up. If you're serious about scaling, upgrade to Claude Pro immediately.
2. **Select the right engine.** In the model selector, choose Claude Sonnet for rapid, high-intelligence work, or Claude Opus with Adaptive Thinking enabled for complex multi-step planning.
3. **Your first operational victory.** Don't test Claude with a riddle. Give it a real, tedious administrative task that you dread doing.

PROMPT

Act as an elite business consultant and operations specialist. I need you to analyze the following raw notes from [describe the source: client meeting / brain dump for a new offer / messy customer complaint].

Your goal is to organize this information into a highly structured, professional [output: client onboarding checklist / project brief / response draft].

Format the output with clear headings, bold key terms, and actionable next steps. No conversational fluff or introductory pleasantries. Start directly with the deliverable.

Here is the raw input:
[paste your messy notes or text here]

— MEASURABLE MILESTONE

By end of Day 1, you've completed a real-world task in 2 minutes that normally takes 45, proving Claude handles your specific business context.

DAY

PILLAR: BUILD

2

CREATING YOUR DIGITAL BOARDROOM

The business why

The reason AI outputs feel generic is a lack of context. If you don't tell Claude who you are, what you sell, and who your customers are, it has to guess. Claude's Projects feature lets you build a dedicated digital boardroom pre-loaded with all your business assets.

CLAUDE PROJECT WORKSPACE

PROJECT FILES

- brand_guidelines.pdf
- customer_avatar.txt
- product_pricing.csv
- system_instructions.txt

SYSTEM PROMPT / PROJECT INSTRUCTIONS

"Act as the lead strategist for [your business]. Use direct language, push back on weak ideas, and prioritize high ROI."

Step-by-step walkthrough

1. **Initiate a project.** Left sidebar in Claude → Projects → Create Project. Name it after your core business (e.g., "Build With Nav: Core Operations").
2. **Upload your context.** Up to 5 foundational documents: website copy, product/service descriptions, pricing sheets, customer avatars, or successful past emails.
3. **Define the ground rules.** In the right panel of the Project, locate Project Instructions (the system prompt). This dictates how Claude behaves in every chat inside this project.

PROMPT

Act as the elite Chief Operating Officer and Lead Marketing Strategist for my business. Your tone must be highly professional, direct, and completely devoid of conversational filler. Do not say "Sure, I can help with that" or "Here is what you requested."

Your core objective is to help me build, monetize, and scale. Always prioritize high-leverage, high-ROI strategies. If my ideas are weak, inefficient, or overly complex, you are expected to push back and propose a simpler, more profitable alternative.

Refer to the uploaded files in this project as your single source of truth for our product offerings, brand guidelines, and target audience.

— MEASURABLE MILESTONE

You have a private, secure workspace that understands your business model. Every chat inside this Project already knows your products, pricing, and philosophy.

DAY

3

PILLAR: MONETIZE

CLONING YOUR BRAND VOICE

The business why

Generic AI copy is bad for business. It destroys trust and dilutes your brand. Today, we train Claude to write exactly like you. Sentence length, vocabulary, tone, formatting. You generate weeks of content in minutes.

Step-by-step walkthrough

1. **Gather your best writing.** Open a blank document. Paste 3 to 5 examples of your best newsletters, social posts, or emails that felt uniquely you.
2. **Identify your banned words.** Write down words you hate (leverage, delve, paradigm, game-changer, testament).
3. **Run the voice analysis prompt.** Paste your samples into Claude using the prompt below.
4. **Save your voice.** Copy the generated Style Guide, save it as **brand_voice.txt**, and upload it into your Claude Project files.

PROMPT

I am uploading several samples of my personal writing. Conduct a deep linguistic analysis of my writing style.

Analyze and document:

1. Sentence structure (average length, rhythm, variation)
2. Tone, attitude, and personality traits
3. Vocabulary preferences (words I use frequently)
4. Formatting preferences (line breaks, bold, punctuation)
5. Strict "banned words" that sound robotic or corporate (include: leverage, delve, robust, game-changer, landscape, key, foster)

Generate a comprehensive "Brand Voice Style Guide" based on this analysis.

Here are my writing samples:

[paste your writing samples here]

— MEASURABLE MILESTONE

You have a permanent **brand_voice.txt** in your Project. For any newsletter, post, or email: "Write about [topic] using the brand_voice.txt file in this project."

DAY

4

PILLAR: SCALE

STREAMLINING COMMUNICATIONS

The business why

The average business owner spends over 15 hours a week reading and responding to emails. By connecting Claude directly to your Google Workspace or Microsoft 365 account, you transform your email workflow from manual writing to rapid editorial approval.

Step-by-step walkthrough

1. **Access Connectors.** Profile icon (bottom left) → Settings → Connectors.
2. **Link your inbox.** Enable the Google Workspace (Gmail & Docs) or Microsoft 365 connector. Authorize through the secure prompts.
3. **Execute inbox triage.** Open a new chat inside your Project and use the email drafting prompt to handle communications.

PROMPT

Using the Gmail connector, retrieve the last [number, e.g., 5] emails from [Client Name or Keyword].

Analyze the context of our ongoing conversation. Based on the business guidelines in this project, draft a highly professional, send-ready response to the most recent email.

The response must:

1. Address all questions or concerns raised in their email.
2. Maintain the exact tone outlined in our brand_voice.txt file.
3. End with a clear, single call-to-action or next step.
4. Be formatted for direct copy-pasting into my email client.

— MEASURABLE MILESTONE

You've killed blank-page syndrome for email. Instead of writing from scratch, you're an editor. Reviewing, tweaking, sending perfectly drafted responses.

DAY

PILLAR: MONETIZE

5

THE VIRTUAL COO (DATA & STRATEGY)

The business why

True scale requires data-driven decisions. Most business owners sit on mountains of unanalyzed data. P&L statements, customer feedback, launch metrics, web analytics. Today we use Claude's massive context window to do deep business analysis and build your growth roadmap.

Step-by-step walkthrough

1. **Prepare your data.** Export an active business document: P&L, customer survey CSV, or social media analytics.
2. **Upload to Claude.** Start a new chat inside your Project. Use the attachment icon to upload the data file.
3. **Run the strategic audit.** Execute the prompt below to extract insights and build an action plan.

PROMPT

Act as an elite Chief Operating Officer and financial strategist. I have uploaded our [describe the data: Q1 P&L spreadsheet / Customer Feedback CSV].

Perform a comprehensive audit of this data to identify:

1. Hidden Opportunities: Where are we leaving money on the table? Underpriced offers, high-converting channels, underserved customer segments.
2. Operational Leaks: Where are we wasting resources, time, or capital?
3. Strategic Recommendations: Provide 3 highly specific, actionable initiatives to implement next month to increase margins and scale operations.

For each initiative, outline the immediate next steps, estimated time to execute, and the key metrics we must track. Format the output in a clean, executive-ready table.

— MEASURABLE MILESTONE

You've extracted sophisticated, actionable insights from raw business data. No expensive consultants, no hours of manual spreadsheet work.

DAY

6

PILLAR: SCALE

OPERATIONS ON AUTOPILOT

The business why

Your attention is your most valuable asset. You should not be manually digging for information every day. Claude's Scheduled Tasks let you set automated, recurring workflows that run in the background, delivering critical intelligence directly into your workspace.

AUTOMATED WORKFLOWS

Monday Morning Briefing

Summarizes unread client emails. Outlines high-priority calendar items.

RUNS MON 7:00 AM

Friday Competitor Digest

Scrapes top 3 industry developments. Drafts strategic response opportunities.

RUNS FRI 5:00 PM

Step-by-step walkthrough

1. **Locate Scheduled Tasks.** Left sidebar → Scheduled Tasks (available on Claude Team and Enterprise).
2. **Create a new schedule.** Click New Scheduled Task.
3. **Set the trigger.** Frequency: Weekly on Mondays at 7:00 AM.
4. **Input the automation prompt.** Paste the briefing prompt below.

Retrieve and analyze all calendar events for the upcoming week and all unread emails from the past 7 days using our connected workspace tools.

Generate a highly concise, 5-bullet executive briefing that outlines:

1. Critical Priorities: The top 3 high-stakes meetings or deliverables I must focus on this week.
2. Communication Bottlenecks: Any client or team emails outstanding for more than 48 hours.
3. Schedule Optimization: Any scheduling conflicts or opportunities to consolidate meetings to protect deep-work time.

— MEASURABLE MILESTONE

You have a self-sustaining administrative loop. Every Monday you're greeted with a targeted operational map of your week. Proactive, not reactive.

DEPLOYING CUSTOM SKILLS & AI SOPS

The business why

To scale, you document your processes so others can execute them. Traditionally that meant writing massive, boring SOPs nobody read. Today we turn SOPs into interactive Claude Skills. Custom tools that execute specific, complex processes perfectly every single time.

Step-by-step walkthrough

1. **Define your most repeated process.** Something weekly: writing a blog post, onboarding a client, building a social media calendar.
2. **Create the interactive SOP.** Use the prompt below to turn messy process notes into a structured, executable Skill.
3. **Save as a master asset.** Save the prompt as **SOP_[Process_Name].txt** in your Project. Whenever you or a team member runs this process, load the file and tell Claude to execute.

PROMPT

Act as an expert systems engineer. I want to build a highly structured, executable Standard Operating Procedure for: [Insert process name, e.g., Creating a Weekly Newsletter].

Here are my raw, messy notes on how this process is currently done:
[Insert your raw steps, notes, or examples here]

Convert this into a master "AI SOP" structured as an interactive skill. Output must include:

1. Objective & Input Requirements: What files, links, or information must the user provide to start?
2. Step-by-Step Execution Protocol: The precise, sequential logic Claude must follow.
3. Quality Control Checkpoints: Specific rules and constraints the output must adhere to (word count, formatting, tone).
4. Interactive Prompts: The exact prompt a team member uses to trigger this SOP.

— MEASURABLE MILESTONE

You've systemized your business operations. Personal knowledge is now executable AI SOPs. Assets that scale with you, hand off to a VA or team member, and let your business run without you in every chair.

NOW BUILD IT LIVE

YOU'VE SEEN WHAT'S POSSIBLE. NOW **BUILD IT.**

Building AI systems is one thing. Building **the right systems for your business**, with live guidance, real implementation, and immediate feedback, is where everything changes.

That's what **Build With Nav** is. We run live online implementation sessions where business owners build real AI systems step-by-step alongside us in real time.

You don't just leave with ideas. You leave with working systems inside your business.

INSIDE THE SESSION, YOU'LL

- Build practical AI workflows **tailored to your business**
- Learn where AI creates the highest leverage in your operation
- Set up the exact systems, prompts, and automations from this guide **live**
- Get direct guidance and feedback throughout the process from Nav
- Walk away with a foundation you can hand off to your team and build on immediately

For those who want hands-on, we also host limited **in-person workshops in select cities**. Edmonton was the first session and it sold out quickly. More cities are coming. You'll be notified the moment we announce the next.

READY TO **BUILD?**

Book your Build With Nav session →