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Give your AI context first: a beginner's guide

Set up ChatGPT or Claude, then teach it how your business works, using five headings we call the Five Cs. A companion to the Hua Hin Today article.

Start here

This guide is for owners who've never used ChatGPT or Claude. It takes you from signing up to your first useful piece of work, one small step at a time.

What you're after is one routine job written down clearly enough that your team can do it without waiting on you. The AI helps you write it, and you and your team check it works.

- **Getting started, in Part 1:** what these tools are, which plan to choose, how to sign up and your first chat.
- **The Five Cs, in Part 2:** how to give the AI the context of your business, so its answers fit the way you work.

Already using one of them? Go straight to Part 2.

If you can, set up on a computer: the screen's bigger and adding files is easier. Once you're set up, the phone app is fine for chatting.

Next step: do this on your own business in the January cohort, with help in the room.

Part 1: Getting started

What ChatGPT and Claude are

ChatGPT and Claude are AI assistants. You type a question or a task in plain words, in Thai or English, and they write a reply. ChatGPT is made by OpenAI and Claude by Anthropic.

They're useful, but they can be wrong and still sound sure. Treat what they write as a draft and check it.

A chat is one conversation with the AI. Depending on your memory settings, both tools can draw on earlier chats, but they don't keep every detail. Don't rely on the AI remembering the details. Keep your business context in the Project.

A Project is a folder for one area of work, such as your business. It keeps your notes, files and working rules together, so every chat inside it starts from them. You'll make one in step 2 of Part 2.

Next step: learn both on your own work in the January cohort.

Which one to choose, and which plan

Both work well for this guide. Both have a free plan, and both let you use Projects on it, with limits. You can try both before you pay anything.

	ChatGPT	Claude
Made by	OpenAI	Anthropic
Website	chatgpt.com	claude.ai
Free plan	Yes, with limits. Projects included, up to 5 files in each Project.	Yes, with limits. Up to 5 Projects.
First paid plan (US price)	Go, USD 8 a month. Up to 25 files in each Project.	Pro, USD 20 a month, or USD 200 for a year paid up front. No limit on Projects.
Next plan up (US price)	Plus, USD 20 a month.	Max, from USD 100 a month.
Sign up with	Email, Google, Microsoft or Apple.	Email or Google, plus a mobile number for a text message code.

These are US reference prices, in US dollars, as shown on the official pricing pages on 23 October 2026. Prices change, and your local price and tax may differ, so check both on the payment screen before you subscribe.

> **Our suggestion for a small business owner:** start with ChatGPT on the free plan. Signing up is simpler, and its first paid plan costs less.
>
> Better still, try both free plans on the same real task from your business, with private details taken out, and compare how useful and accurate the answers are.
>
> Work through Part 2 on the free plan. If you run out of messages or file space, move to Go. Move up to Plus only if Go still isn't enough.

Prefer Claude, or already paying for one of them? Stay with it. Every step in Part 2 shows both.

Next step: the January cohort teaches both and helps you choose.

Signing up, step by step

ChatGPT

1. On a computer, go to chatgpt.com in your web browser and skip to step 4.
2. On a phone, open the App Store (iPhone) or Google Play (Android) and search for ChatGPT.
3. Check the maker is OpenAI, then install the app and open it.
4. Choose Sign up.
5. Now choose Continue with Google, or type your email address.
6. Follow the steps on the screen to finish.

When it's worked, you'll see an empty chat with a box at the bottom where you can type.

Claude

1. On a computer, go to claude.ai in your web browser and skip to step 4.
2. On a phone, open the App Store (iPhone) or Google Play (Android) and search for Claude.
3. Check the maker is Anthropic, then install the app and open it.
4. Choose Continue with Google, or type your email address and choose Continue with email.
5. If you used email, open the email from Claude and choose the link in it.
6. Type your mobile number when asked. Every new account needs this.
7. Type in the code Claude sends you by text message.

When it's worked, you'll see a box where you can type your first message.

Paying, when you're ready

Stay on the free plan until you've tried it. To upgrade, use a computer and follow these steps.

ChatGPT:

1. Choose your profile picture or initials.
2. Select Upgrade plan.
3. Pick Go or Plus, and check the price.
4. Type your card details and confirm.

Claude:

1. Choose your initials or name in the lower left corner.
2. Open Settings, then Billing.
3. Choose Upgrade plan, then Get Pro plan.
4. Pick monthly or yearly billing.
5. Type your card details and choose Subscribe.

When it's worked, your account shows the new plan name. Paid plans renew by themselves until you cancel.

Phone or computer

You can use the same account on your phone and your computer. Always sign in the same way, with the same email or Google account. A different one opens a separate, empty account.

Next step: if set-up gets stuck, week 1 of the January cohort gets your account working.

Your first five minutes

1. Choose New chat.
2. Type a simple question about something you know well, so you can judge the answer. You can try this one:

Try this

Write a short, polite message to a customer saying our shop is closed next Monday for a public holiday.

3. Press Enter, or tap the send arrow.
4. Read the reply. Is it right? Does it sound like you?
5. Ask for a change in the same chat, for example: "Make it shorter and more friendly." It remembers what you said earlier in this chat.
6. To start something new, choose New chat again. Your old chats stay in the menu, so you can go back to them.

That's the basic skill: ask, read, correct. Part 2 makes the answers fit your business.

Don't type private details yet. Switch off training first, in step 1 of Part 2.

Next step: keep going, or spend six weeks on your own work in the January cohort.

Words you'll see

- **Prompt:** what you type to the AI, an instruction in plain words.
- **Chat:** one conversation. Keep your business context in the Project, not in old chats.
- **Project:** a folder that keeps your notes, files and rules, so every chat inside it starts from them.
- **Upload:** adding a file from your phone or computer, usually with a + or paperclip button.
- **Model:** the AI engine behind the app. Your plan decides which ones you get, so you don't need to choose.

Next step: if you can use email and a web browser, you can follow the January cohort.

Part 2: The Five Cs

Before you'll get sense from an AI, you need to give it the context of your business. This guide shows how, using five headings we call the Five Cs. Allow more than one sitting.

Short of time? Do steps 1 and 2, and write just the Company heading in step 3. Complete steps 4 to 6 before trying step 7. Add the rest of your Five Cs later.

- **C** **Company** how your business works
- **C** **Character** your story and how you sound
- **C** **Controls** where the AI stops
- **C** **Customers** who you serve
- **C** **Credibility** what you can show

1 Switch off training

Do this before you upload anything on a personal account.

- **ChatGPT:** Settings, then Data controls, then switch off "Improve the model for everyone".
- **Claude:** Settings, then Privacy, then switch off "Help Improve our AI models".

This stops new chats being used to train future models. It doesn't make your files private, so step 4 still matters.

Next step: write a safety rule your staff can follow in week 3 of the January cohort.

2 Create a Project

A Project is a workspace that holds your notes, files and working rules, so every chat starts from them.

- **ChatGPT:** choose New project in the sidebar and give it a name, for example "[Your business] workspace".
- **Claude:** choose Projects in the sidebar, then + New Project. It doesn't read the name or description in chats, so put your business details in the files.

Both work on the free versions, with limits.

Next step: set this up on your own laptop in the January cohort.

3 Write your Five Cs

Write one page with the five headings below and a few plain lines under each. Company matters most, because it shows where work gets stuck and which decisions keep coming back to you. Write in Thai or English, whichever comes easier.

C Company: how your business works

- **What you sell:** main products or services, what's included and what isn't.
- **Who does what:** by role, not by name (owner, office, staff).
- **How work moves today:** when an enquiry arrives, who picks it up, where it's recorded and how it gets done.
- **Decisions that wait for you:** the questions that keep landing back on you.
- **Bookings, orders or quotes:** how availability, stock or your team's time is checked, who confirms, and your change and cancellation rules.

C Customers: who you serve

- **Who buys from you:** the people you serve and how they find you.
- **What matters to them:** what brings them back, and what makes them unhappy.
- **Common questions:** the ones your staff answer every week.
- **One example from start to finish:** an enquiry, what followed and the follow up messages. No safe example? Write one and label it INVENTED.

C Character: your story and how you sound

- **Your story:** why you started and the experience that shapes your approach.
- **Values:** how you want customers and staff to be treated.
- **Style:** how your messages should sound, and what you'd never say.
- **Examples:** one or two short pieces of your own writing, and what you like about them.
- **Your visual identity:** your current logo, colours and fonts.
- **One case study:** the situation, what you did, what changed, and the evidence that shows it.

C Credibility: what you can show

- **Results and feedback:** only what you're allowed to use.
- **Facts kept apart:** start each line with PROVEN, MEMORY or EXAMPLE.
- **Private material:** mark it "NOT FOR PUBLICATION". That label is an instruction to the AI, not a privacy safeguard: the file still sits in your Project. Take private details out first, as step 4 shows.

Read step 4 before you add any customer's words or your case study.

C Controls: where the AI stops

- **What good looks like:** one or two plain goals.
- **Who can agree what:** prices, dates, discounts and changes, and what staff may promise.
- **Checklists:** any checklist or standard wording your staff use. None? Say so, so it doesn't invent one.

- **Never:** anything the AI must not invent, change or promise.

Next step: week 2 of the January cohort is this step: your business written up for the AI.

4 Make it safe and add it

Switch off training first (step 1). Then take out names, phone numbers, emails, addresses, signatures, passwords, bank and payment details, and any prices you'd keep private. Use the same invented names every time (Customer A, Supplier B). Check comments, tracked changes and screenshots too. Renaming a file doesn't change what's inside it.

- **Never upload:** bank records, staff files or customer lists.
- **Customer stories and your case study:** use invented names, and take out anything else that could identify the person or their business, such as where they live or work.
- **Testimonials:** ask the customer's permission first. Thailand's personal data law (PDPA) covers their name and details.

Save your Five Cs page as a document, for example a Word file or a PDF. Label it and any current file it mentions with its subject, date and status, in the file name and at the top:

- CURRENT Five Cs [date]
- INVENTED Example enquiry A17

Add it to your Project

ChatGPT calls the files in a Project its sources:

1. Open your Project.
2. In its sources area, choose Add sources.
3. Pick your Five Cs file.
4. Check its file name appears in the Project's sources.

Claude calls them project knowledge:

1. Open your Project.
2. Find the project knowledge area, on the right of the Project's page.
3. Use its add button to upload your Five Cs file.
4. Check its file name appears in the project knowledge.

Do the same for any current file your Five Cs page mentions.

Next step: week 3 of the January cohort also covers keeping customer details, staff files and bank records out.

5 Add the working rules

Open the Project's instructions and paste the text below. In ChatGPT, open the Project, choose the three dots menu (•••), then Project settings. For Claude, open the Project and choose Set project instructions.

Working rules to paste

Use only the files in this Project and what I tell you, and say which file a fact came from. If something's missing, unclear or contradictory, ask; don't guess. Ask one question at a time. Don't suggest changes until I confirm you've understood. Mark anything not agreed as 'to confirm'. Never invent prices, dates, rules or promises. Don't send messages or change any records.

Save it. Keep your originals, and update the Project when the business changes.

Next step: in the January cohort, we'll challenge your work and help you make it better.

6 Have it question you

Start a new chat inside the Project and type:

Type this

List the files you can open. Then ask me one question at a time until you understand how my business works. After that, explain back to me what happens.

Check its file list against what you uploaded. Correct anything it gets wrong, and ask what's missing from your Five Cs. Expect a few rounds.

When it explains your business back correctly, ask for a short summary and check it with whoever does the work.

Don't rely on the AI remembering the details. Keep your business context in the Project. So save the summary there, not just on your computer:

1. Copy the summary into a new document and name it "CURRENT Agreed understanding [date]".
2. Add it to your Project the same way as your Five Cs page in step 4.
3. Check its name appears in the Project's sources (ChatGPT) or project knowledge (Claude).

In ChatGPT there's also a shortcut: open the menu on the summary reply and choose Add to project sources.

Next step: before week 1 of the January cohort, you spend about an hour talking your business through with the AI.

7 First exercise: the article's prompt

Use the prompt from the article, word for word:

The article's prompt

> Here's how we handle [the process]. Good looks like [the result you want]. Ask me questions until you understand how it works now. If you don't know, say so. Then challenge it: where are the gaps, the duplication and the delays waiting on me? When I confirm you've understood, draft a step by step procedure for my staff, and a handover note with the next action and who's responsible. Mark anything not agreed as 'to confirm'.

When the procedure reads right, ask whoever does the work to try it on one ordinary job, and correct it together. Then save that prompt in your Project with a clear name, so you and your staff can use it again for the next process.

Next step: in weeks 4 and 5 of the January cohort, you map one workflow and write a procedure your team can use.

8 Second exercise (optional): a reply in your voice

Type:

Type this

> Using my Five Cs, draft a short reply to [a question customers often ask]. Tell me which lines you're unsure of.

Correct it, and add what you changed to Character.

Next step: week 1 of the January cohort builds writing rules from your own messages, so it sounds like you.

9 Check before you act

Treat its output as a draft to check, not an answer to trust.

- Compare figures, prices, dates and promises with your originals.
- Asking AI to check itself isn't independent checking.
- Test a change on a small, low risk example first.
- If you can't check it, don't act on it.

Then ask the person who'd act on it: is this right?

Keep it current: when prices, staff or the way you work change, update your Five Cs page first.

Next step: build one task and test it on your own work in week 6 of the January cohort.

Help pages

If your screen looks different, these pages show the current steps:

- **ChatGPT Projects:** help.openai.com/en/articles/10169521-projects-in-chatgpt
- **ChatGPT data controls:** help.openai.com/en/articles/7730893-data-controls-in-chatgpt
- **Claude Projects:** support.claude.com/en/articles/9519177-how-can-i-create-and-manage-projects
- **Claude privacy settings:** privacy.claude.com/en/articles/12109829-how-do-i-change-my-model-improvement-privacy-settings

Next step: if your screen still looks different, bring your laptop to the January cohort. There's help in the room.

The January cohort

If you'd like help putting this guide to work, our January cohort is six weekly two-hour sessions in Hua Hin for business owners and one of their team. If a colleague comes with you, they book their own place. You work on your own business, and you finish with:

- AI set up with the right context: a written picture of your business and writing rules taken from your own messages, so it sounds like you.
- One workflow mapped, with the decisions that wait for you named.
- A written procedure your team can use, kept in your own shared folder.
- One task you can repeat, built and tested on your own work, and a plan for the next 30 days.

The price is THB 20,000 per attendee.

This is the cohort, our group course. It's separate from The Business Read, our one-to-one review of a single business.

If you'd like to know whether it would suit your business, book a free 20-minute Fit Call:

Book a free Fit Call

Not ready yet? That's fine. The guide's yours either way.

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