Project Setup SOP

Purpose: a repeatable procedure for creating a new Claude Project — reusable for every ongoing workstream in your business or life. Hand it to a team member and they can do it too.

Step 0 — Should this be a Project?

Create a Project only when ALL three are true:

- [ ] It's an **ongoing workstream** you'll return to for months (a business, a channel, a search) — not a one-off task
- [ ] You keep **re-explaining the same context** in regular chats
- [ ] Consistency matters — the outputs should sound the same every time

If it's a one-off task, just use a regular chat with a good briefing. Start small: a few well-defined Projects, one per ongoing area of work.

The 7-step setup (about 15 minutes)

- [ ] **1. Generate your brief** — in a regular chat, run the interview prompt from the Project Brief Template. Answer honestly.
- [ ] **2. Create the Project** — sidebar > Projects > '+ New Project' (or claude.ai/projects)
- [ ] **3. Name it after the workstream** — 'My Business', not 'Stuff' — a name you'll recognize in six months
- [ ] **4. Paste the brief** into the Project's custom instructions
- [ ] **5. Add 1-3 knowledge files** — services list, best writing sample, price sheet
- [ ] **6. Test with zero context** — ask 'Draft a short introduction of my business for a newsletter' with no other briefing
- [ ] **7. Grade the result** — if anything is off (wrong tone, missing detail), fix the instructions now, while it's fresh

Maintenance routine

When	What to do
Weekly (10 min)	Ask each active Project: "Based on our recent chats, what should we add or update in your instructions?"
When you repeat yourself	The moment you re-explain something twice in chats, move it into the instructions
Monthly	Skim the knowledge files — swap anything stale (old prices, outdated services)
When results drift	Re-run the zero-context test from Step 6 and fix what changed

Good to know (verified July 2026): the free plan includes up to 5 Projects; Pro includes unlimited Projects plus enhanced project knowledge. Limits change — check claude.com/pricing.

Remember the rule: chats are for tasks, Projects are for workstreams. Memory makes Claude familiar — a Project makes it briefed.