conversionminded

A GUIDE FROM CONVERSIONMINDED

# If You're Only Using Chat, You're Using a Fraction of Claude

Nobody tells you which of Claude's features you actually need, which ones you don't, and where to start. So most of us stay in the chat box, not realizing the rest of Claude's features are waiting to make our lives easier.

Full disclosure: we're still learning. Every day, in fact. But here are the six moves that made the biggest difference to our productivity.

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# Choose The Right Model For The Task

Getting capped mid-project is the single biggest productivity killer in Claude. Look for the model dropdown in your chat window to toggle between them before you start your next session. Bottom line: match the model to the task. Your everyday work can run on Sonnet so you stop hitting your usage cap, and your important work gets the stronger models.

| MODEL | REACH FOR IT WHEN | WHAT IT'S LIKE |
|---|---|---|
| **Sonnet** | Planning, brainstorming, research, everyday back and forth. It's the default for a reason, most days you never need to leave it. | Holds a long working session without wearing out your usage. |
| **Opus** ** for your most important content* | The drafts that carry weight: your sales page, a launch email sequence, cornerstone content, anything where the argument has to hold up. | Opus 5 is the strongest writer and editor in the lineup. For a routine post, Sonnet is often indistinguishable, so save Opus for the pieces that matter. |
| **Haiku** | The boring bulk jobs. Reformatting a list of 200 blog titles, pulling the numbers out of a table you pasted in, cleaning up a messy transcript, writing 40 alt-text descriptions. | Fast and light. Good for simple tasks, doesn't burn up your usage. |
| **Fable** | Call in the big guns for critical or complex tasks and the work Opus can't crack: like turning a pile of messy inputs into a strategy, analyzing why something isn't performing, and building the components of a product. | Thinks before it answers, sometimes for a while, and burns your usage fastest of all. One Fable conversation on the right problem earns its keep. Ten on the wrong ones is your week's allowance gone. |

**NOTE: SWITCH MODELS IN A FRESH CHAT**

You might be tempted to switch models mid-chat, but that can consume more tokens than staying on the model you started with. Starting a fresh chat resets the context window and keeps token costs down when switching.

# Projects

If you find yourself pasting the same background information into your chats over and over again, setting up a project is the fix. When you make a project, keep the scope specific: one offer, one course, one client, one specific job you want Claude to assist you with. The tempting move is to load your whole business into a single project, but the more unrelated material a project holds, the more Claude has to guess which part matters to this conversation and it gets confused.

| PROJECT | UPLOAD | WHAT YOU ASK IT |
|---|---|---|
| **Customer questions** | Product docs, your FAQ, previous support replies | "My customer emailed me with this problem, how should I respond?" |
| **One per client** | Their goals, your session or meeting notes, past deliverables | "Draft the follow-up email from today's session notes." Every chat about that client starts already knowing their whole history. |
| **One offer you sell** | The sales page, what buyers receive, testimonials, the questions people ask before they buy | "Write this week's email about this offer." You stop briefing Claude on what you sell before every single task. |

**THE COOLEST WAY WE'RE USING PROJECTS**

When we launch a course, we set up a course brain — the actual full curriculum loaded in the project's knowledge base — lessons, transcripts, worksheets, the works. When a student asks a question or requests a new feature, we can ask the course brain to help with the reply or help with course updates and improvements.

**NOTE: PROJECTS ARE SILOED**

A project is a closed room, and what goes into it stays in it. Your projects can't read your regular chats and vice versa. Which means searching for that decision you made 3 weeks ago can get tricky if it's not filed correctly. If you discuss project details in a regular chat but it belongs in a project, move the discussion — there's a dropdown at the top of the chat where you can add to project and select the right folder.

# Connectors

This is where the productivity gains really take off. A connector plugs Claude into apps you already use, so it can read what's in them and do things inside them. The copying and pasting stops, you stop paying a cognitive tax for switching between apps, and Claude starts behaving like a virtual assistant.

| CONNECT | AND CLAUDE CAN |
|---|---|
| **Google Drive** | Read your docs and spreadsheets so you don't have to upload them manually in order to give Claude context that's living inside your Drive. It goes the other way too, ask for a document you can open in Drive and it lands there. |
| **Notion** | Read your pages and databases, draft straight into them, and pull your content calendar so it can plan around what's already scheduled. |
| **Canva** | Access your brand kit, search your existing designs, make new ones. |
| **Slack** | Read a channel and catch you up on what you missed, including who agreed to what. |

### HOW WE'RE USING CONNECTORS

Notion has been our operational home base for many years, but now Claude does all the data entry for us. It tracks our campaigns, keeps the project pipeline and task list up to date, and organizes all of our systems. The data entry alone saves us dozens of hours a month.

→ **Try this:** connect Notion, set up a master task list there, and end every Claude session with "update my task list in Notion and note where I left off and where I'll pick up tomorrow." Tomorrow you can start your day by asking Claude what you need to focus on first.

### ADVANCED CONNECTIONS (WE'RE NOT READY)

Many services you're already using likely have MCP connectors (think of them like USB-C ports that let Claude plug into them): Kit, Meta Ads, Stripe, etc. Right now we don't connect Claude to the high-stakes apps (anything that touches money). Do what you're comfortable with, but for now we're keeping Claude on the low-stakes connectors and if you're nervous about trying Connectors, that's a good way to start.

# Claude Design

Claude Design produces finished designs: pages, decks, documents, downloadables. It's included on paid Claude plans.

Set up your brand's design system so Claude Design knows your colors, fonts, logo, and the look you want. Point it at your website or a couple of designs you already love and ask it to build your design system from them. After that, everything you ask for comes out on brand automatically.

| HAND OFF | BRIEF CLAUDE WITH |
|---|---|
| **Lead magnets and freebies** | Who it's for, the promise on the cover, and the content itself. Even rough. It handles layout, hierarchy and polish. |
| **Landing and sales pages** | Your copy, the one action you want the visitor to take, and where the button goes. |
| **Course materials** | Slide decks, worksheets, planners, cheat sheets, etc. |
| **Client one-pagers and proposals** | Scope, pricing, timeline, onboarding documents, etc. |

**NOTE: THE MENTAL SHIFT YOU NEED**

When working with Claude Design, remember that you're the client, not the designer. You're not in Canva pushing elements around, you're briefing a design contractor. Tell it who it's for, what it needs to do, and what you want it to look like and it can do the production. When you want revisions you can request them, but just like working with a designer, revisions cost money (in this case, tokens).

You can make small edits and leave comments to request changes, but Design burns through your usage fast. Come with the plan, the draft, the brief, the idea. Whatever you do, don't start chatting your way toward figuring out what you want. If you need to plan out a design brief, do that with Sonnet in regular chat first, then move the brief to Claude Design.

# Cowork

Chat can only see what you paste or upload into it, it can't reach your computer. Cowork can. Point it at a folder and it reads, writes and organizes the files inside that folder. The folder is the boundary, it can't touch anything outside the one you granted.

| POINT IT AT | AND ASK FOR |
|---|---|
| **A client or project folder** | What's in there, what's missing, or where the work stands. |
| **The folder you're embarrassed by** | Downloads, or your desktop. It reads what the files are, sorts them, renames them, and tells you where everything went. |
| **A pile of notes or transcripts** | Meeting notes, voice memos, a folder of half-finished drafts. It reads the lot and turns them into one clean document. |

### HOW WE'RE USING COWORK

We use Cowork for our weekly analysis and high-level report so we can see how campaigns performed, what we're focused on, and what our priorities are. We export the spreadsheets (Kit, ThriveCart, Meta), drop them in one folder, and let Cowork assemble the report and drop it into Slack.

Reaching the files on your hard drive takes Cowork. Getting that report formatted the same way every week without explaining it again each time takes one more thing, which leads us to...

# Skills

A skill is just a persistent set of instructions for Claude to use across all chats. You can either ask Claude to create a skill for you or upload third-party skills that have already been created. Upload the skill file under Customize → Skills and Claude will follow those instructions.

Installing your first skill feels like a technical step but it really isn't. Once a skill is installed, Claude reaches for it on its own when the task matches, or you invoke it directly by typing /skill-name in the chat.

Here's the range of what people commonly create skills for.

## Content

| A SKILL FOR | WHAT YOU GET, EVERY TIME |
|---|---|
| **Your voice** | Drafts in your rhythm and your word choices instead of generic AI cadence. |
| **Repurposing a piece** | One post turned into the formats you actually publish in, not a generic list of ideas. |
| **Subject lines and titles** | Options generated from the draft you already wrote using the formulas you trust. |
| **Formatting a blog post draft** | Headers, structure and scannability applied the way you format posts for SEO/GEO optimization and human engagement. (Claude is notoriously underwhelming when it comes to post outlines — e.g., it uses clever copywriting instead of search intent terms. A formatting skill easily fixes it.) |

# Skills

## Operations

| A SKILL FOR | WHAT YOU GET, EVERY TIME |
|---|---|
| **Customer replies** | Answers built from your policies and FAQ documents. |
| **Your weekly numbers** | The same export becomes the same summary, in the same shape, every week. |
| **Proposals and quotes** | Your template filled in with this client's details, in your structure. |
| **Any process you've perfected** | If you follow the same steps or the same format for a task, or find yourself prompting Claude on how to do things over and over, it's probably a good candidate for a skill. |

## A Better Claude Experience

| A SKILL FOR | WHAT YOU GET, EVERY TIME |
|---|---|
| **Claude project guidance** | Interviews you about the work, then hands you the instructions and context brief to paste into a new project. Later it flags what's gone stale in there: e.g., this draft is superseded, swap it for that one. |
| **Self-checking when it drifts** | Stops, audits its own work, and owns where it went off when it starts losing the plot and supplying you with contradictions. |
| **Notifying you the chat has become a rabbit hole** | Catches itself the moment a messy session carrying multiple decisions and tangents should really become a new chat if you want the best performance. Rather than falling deeper down the rabbit hole, it checks in with you to let you know. |

Those last three skills? They're already built. They're free. And they're yours!

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WHAT'S INSIDE

## Free Claude Skills

Three instruction sets that fix the Claude habits costing you the most time and frustration. No coding, no new app, nothing to pay. Comes with a short walkthrough on installing a skill in your own Claude account. Under 5 minutes and you're set up.

🧱 **The Project Starter**

Walks you through setting a new project up properly, hands you the instructions and context brief to paste in, then flags what's gone stale in there later.

⚓ **Drift Killer**

Makes Claude stop, self-check, and re-anchor when a long chat has gone sideways.

🐰 **The Rabbit Hole Off-Ramp**

Tells you when a chat has got too messy and a fresh one would give you a better result. Install it and forget it.

**Get the free skills**

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