



HIC AI: Claude Onboarding 101

V1.0 · APRIL 2026

Before We Get Started

Three quick prerequisites. Do them in order. We can't share Claude access until you've completed all three.

1 Submit your Claude access form

Head to zanderfryer.com/hic-claude-access and fill out the short form. The Operations team gets notified the moment you submit it.

2 Wait for your Claude access (2 to 24 hours)

We send your Claude Team invite from Anthropic within 2 to 24 hours of your form submission. Check your work email.

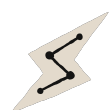
3 Watch the 3 mandatory trainings on Skilljar

While you wait on your Claude invite, knock these out. Head to anthropic.skilljar.com and create a free Skilljar account (this is separate from your Claude account). Then click any card below to open the training, or use the link in each title.



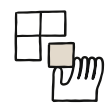
Claude 101

Learn how to use Claude for everyday work tasks, understand core features, and explore resources for more advanced learning on other topics.



Introduction to Claude Cowork

Hands-on course covering the Cowork task loop, plugins and skills, file and research workflows, and how to steer multi-step work responsibly so you're productive in your first week.



AI Fluency: Framework & Foundations

Learn to collaborate with AI systems effectively, efficiently, ethically, and safely.

Please complete all 3 trainings before you start using Claude. Once you're done, flip to the next page, pick your path, and follow the setup steps.

Get Set Up With Claude

Welcome to High Impact Coaching. This guide gets you onto Claude with the company context loaded so it actually knows what we do here. Setup should take about 20 to 30 minutes end-to-end.

If anything is unclear or breaks, head to **#hic-ai** in Slack. The two files you'll need (`hic-mission.md` and a sample `mission.md`) are pinned at the top of that channel.

Pick the path below that matches you.

PATH A, [👉 CLICK HERE](#)

I'm new to Claude

I've never used Claude before. Start me from the beginning.

PATH B, [👉 CLICK HERE](#)

I already have a Claude account

I'm already on Claude. Help me bring my HIC work to the new team account, leave personal stuff behind.

Contents

Before we get started (required)

Submit the access form, wait 2 to 24 hours, watch 3 short trainings on Skilljar. See page 2.

Path A: New to Claude

Full setup for people who've never used Claude before. 12 steps.

- A1 Accept your invite
- A2 Download the desktop app
- A3 Sign in
- A4 Click the Cowork button
- A5 Click "Work in a project"
- A6 Click "+ Create new project"
- A7 Click "Start from scratch"
- A8 Name it and pick a folder
- A9 You should see an empty chat
- A10 Drop in the HIC mission file
- A11 Paste the starter prompt
- A12 Answer Claude's questions

Contents (continued)

Path B: Already have a Claude account

Migration + setup for people already on Claude. 17 steps.

- B1 Accept the team invite
- B2 Quit and restart the Claude app
- B3 Click your name in the bottom-left
- B4 Stay on (or switch back to) your OLD account
- B5 Open one of your existing HIC projects
- B6 Paste the handoff prompt
- B7 Save Claude's output
- B8 Switch to the new High Impact Coaching account
- B9 Click the Cowork button
- B10 Click "Work in a project"
- B11 Click "+ Create new project"
- B12 Click "Start from scratch" (or use existing folder)
- B13 Name it and pick a folder
- B14 You should see an empty chat
- B15 Drop in the HIC mission file AND your handoff doc(s)
- B16 Paste the migration starter prompt
- B17 Answer Claude's remaining questions

Where to get help: the #hic-ai Slack channel

Path A: New to Claude

If you've never used Claude before, follow these 12 steps from top to bottom.

Step A1. Accept your invite

Check your inbox for an email from Anthropic. Subject line is something like *"You've been invited to join High Impact Coaching on Claude."* Click **Accept invite**. It opens a browser tab where you set up your account.

Use your work email, the same one Nikita sent the invite to.

Step A2. Download the desktop app

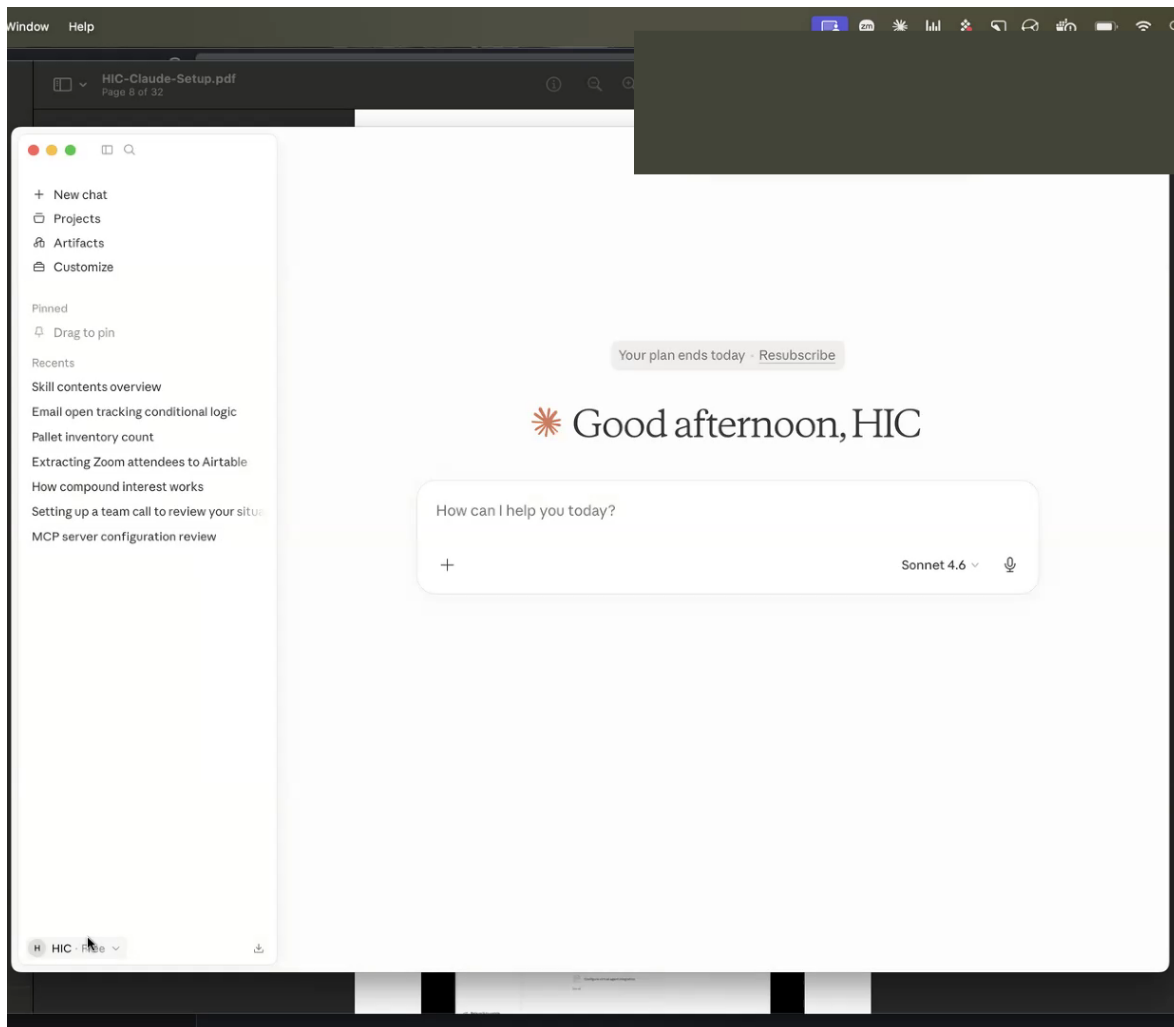
Go to **claude.ai/download** and grab the app for your machine. We use the desktop app, not the browser version, because the desktop app can read files on your computer.

Mac: drag Claude.app to your Applications folder, then open it.

Windows: run the installer, then launch Claude from the Start menu.

Step A3. Sign in

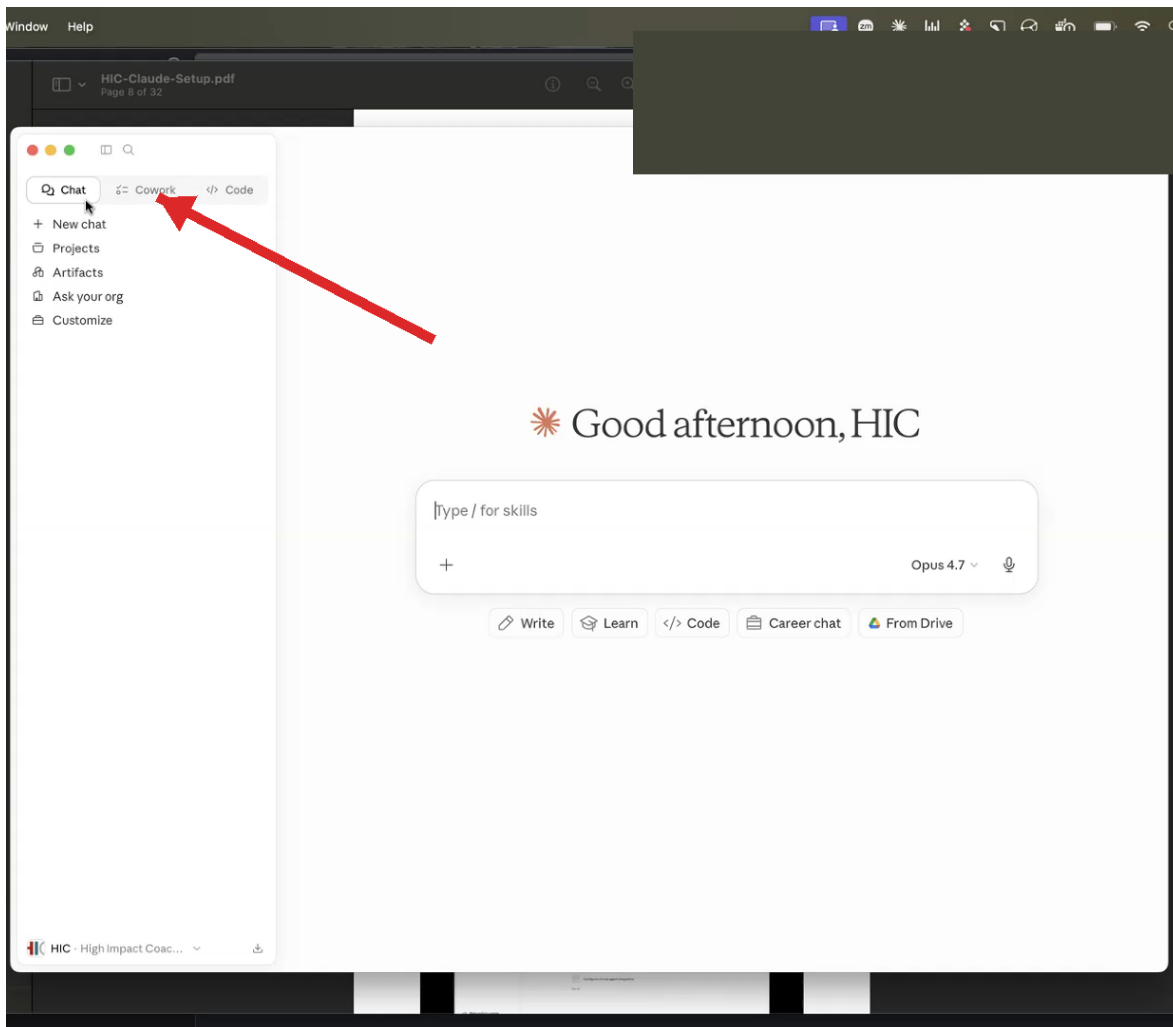
Open the Claude app and sign in with your work email. You should see **High Impact Coaching** as your org in the top-left corner.



If you don't see High Impact Coaching, ping Nikita. The invite probably went to a different email.

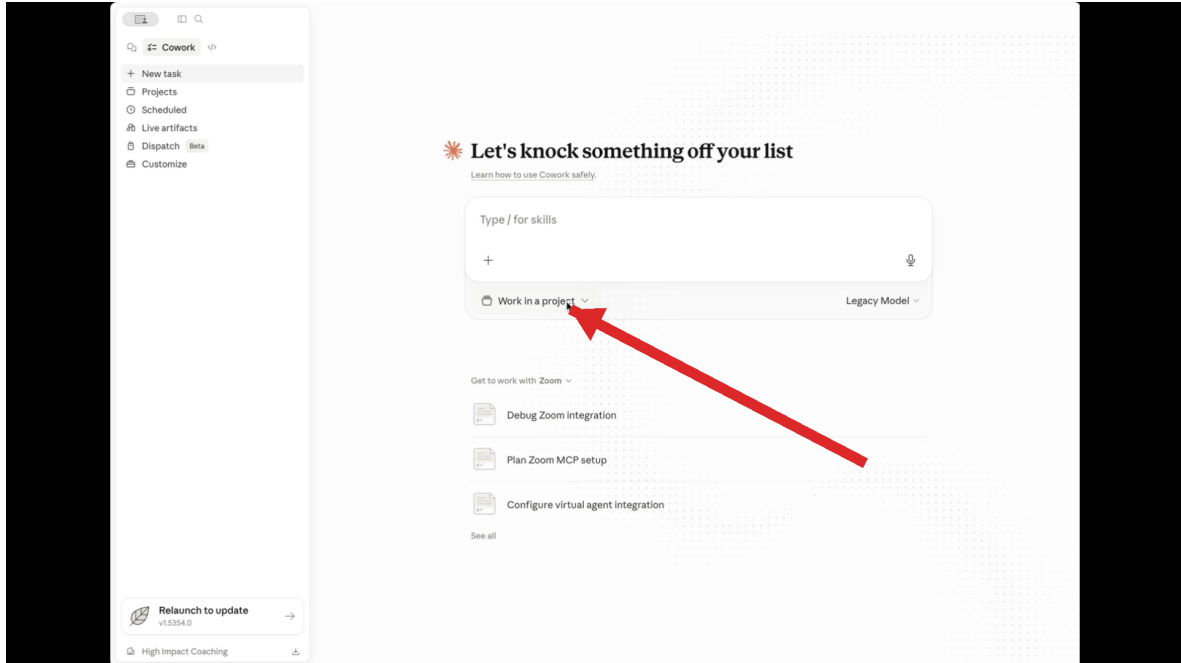
Step A4. Click the Cowork button

Cowork is the mode where Claude can read files on your computer and help you with real work. It's the middle button at the top of the home screen.



Step A5. Click "Work in a project"

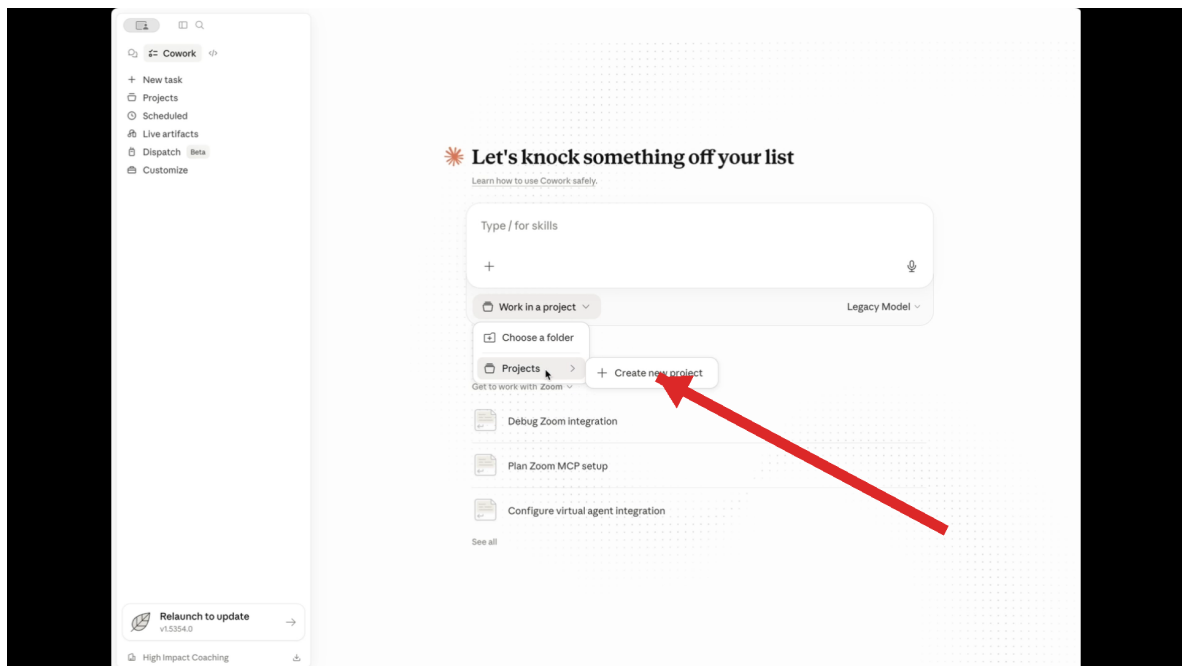
In the chat input box, click the **Work in a project** button. This is where you create or pick a project.



A project is just a folder on your computer that Claude has access to.

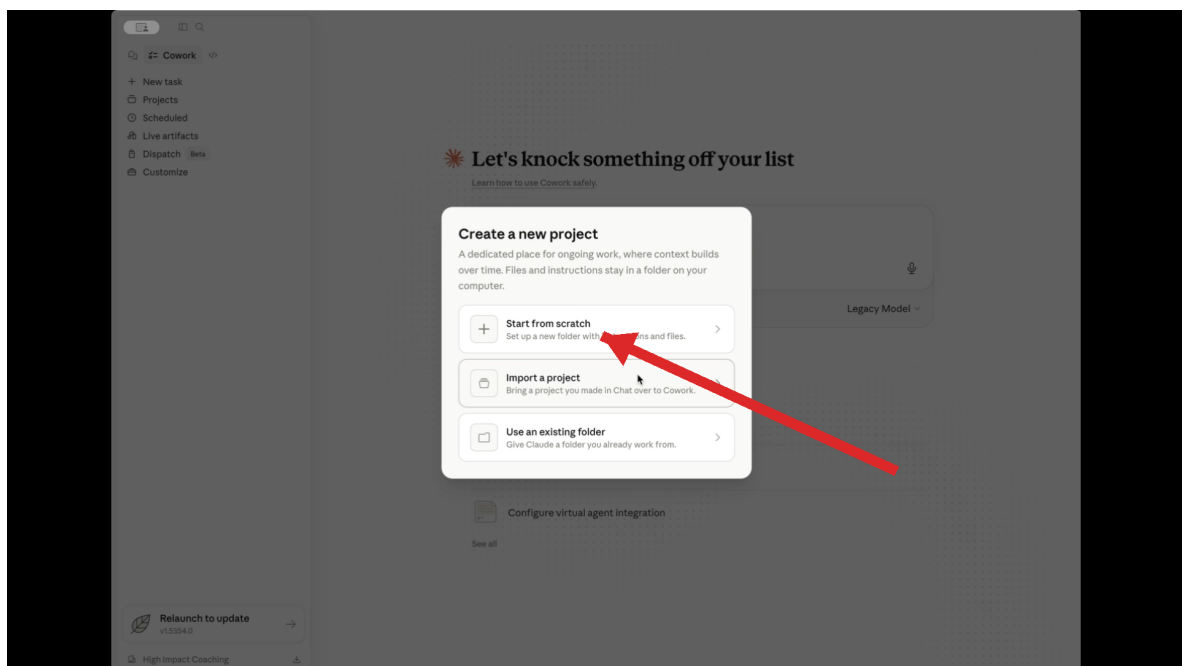
Step A6. Click "+ Create new project"

In the dropdown that opens, hover over **Projects**, then click **+ Create new project**.



Step A7. Click "Start from scratch"

A modal pops up with three options. Click **Start from scratch**.

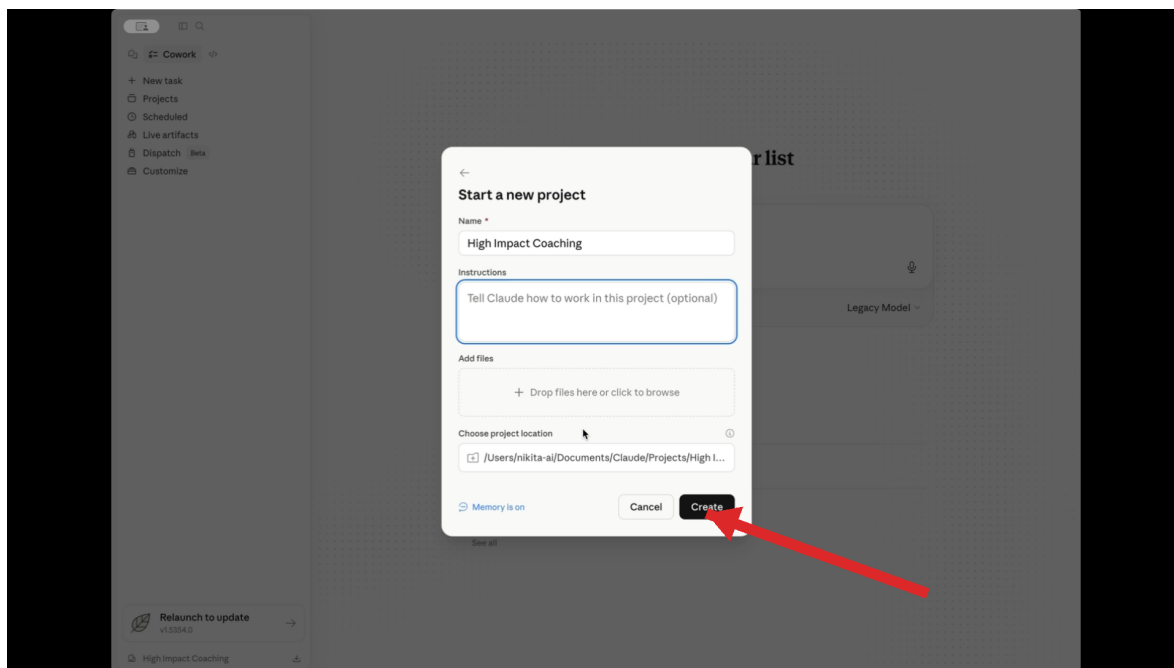


Step A8. Name it and pick a folder

Name the project **High Impact Coaching**. Pick a folder location on your computer. Whatever you pick, remember it, you'll need to find this folder in a minute.

Mac: recommended path is `~/Documents/HIC`

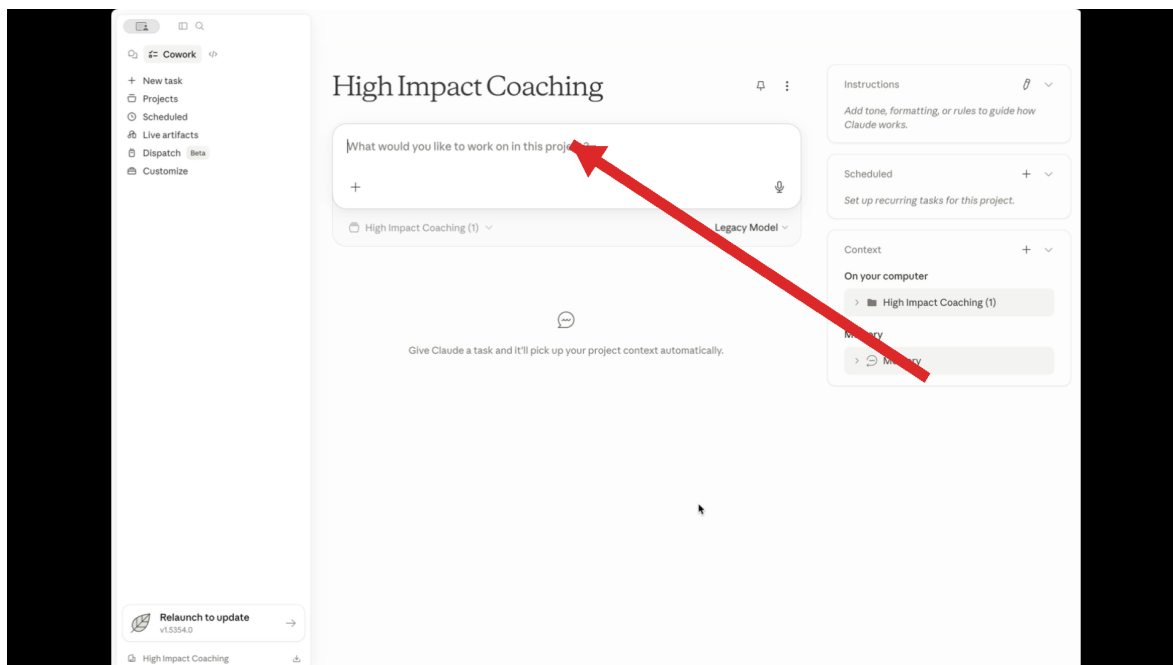
Windows: recommended path is `Documents\HIC` (under your user folder)



Click **Create**.

Step A9. You should see an empty chat

Your new High Impact Coaching project is set up with an empty chat ready for your first message.



Don't type anything yet. One more thing before we paste the prompt.

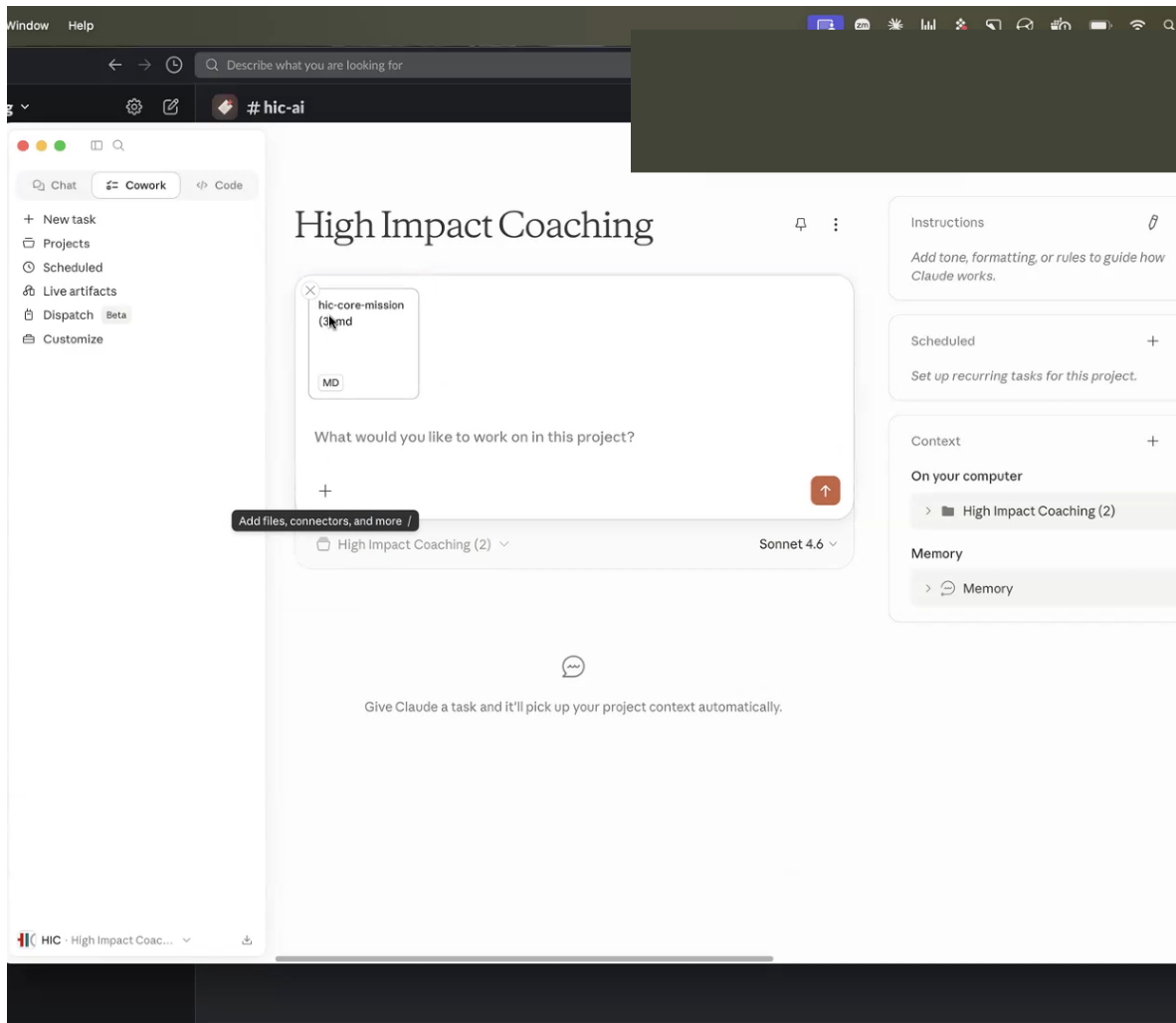
Step A10. Drop in the HIC mission file

The `hic-mission.md` file is sent by Zander or the Operations team and pinned at the top of the `#hic-ai` Slack channel. Download it from there.

Then drop it into the project folder you picked in Step A8.

Mac: open Finder, navigate to `~/Documents/HIC`, drag the file in.

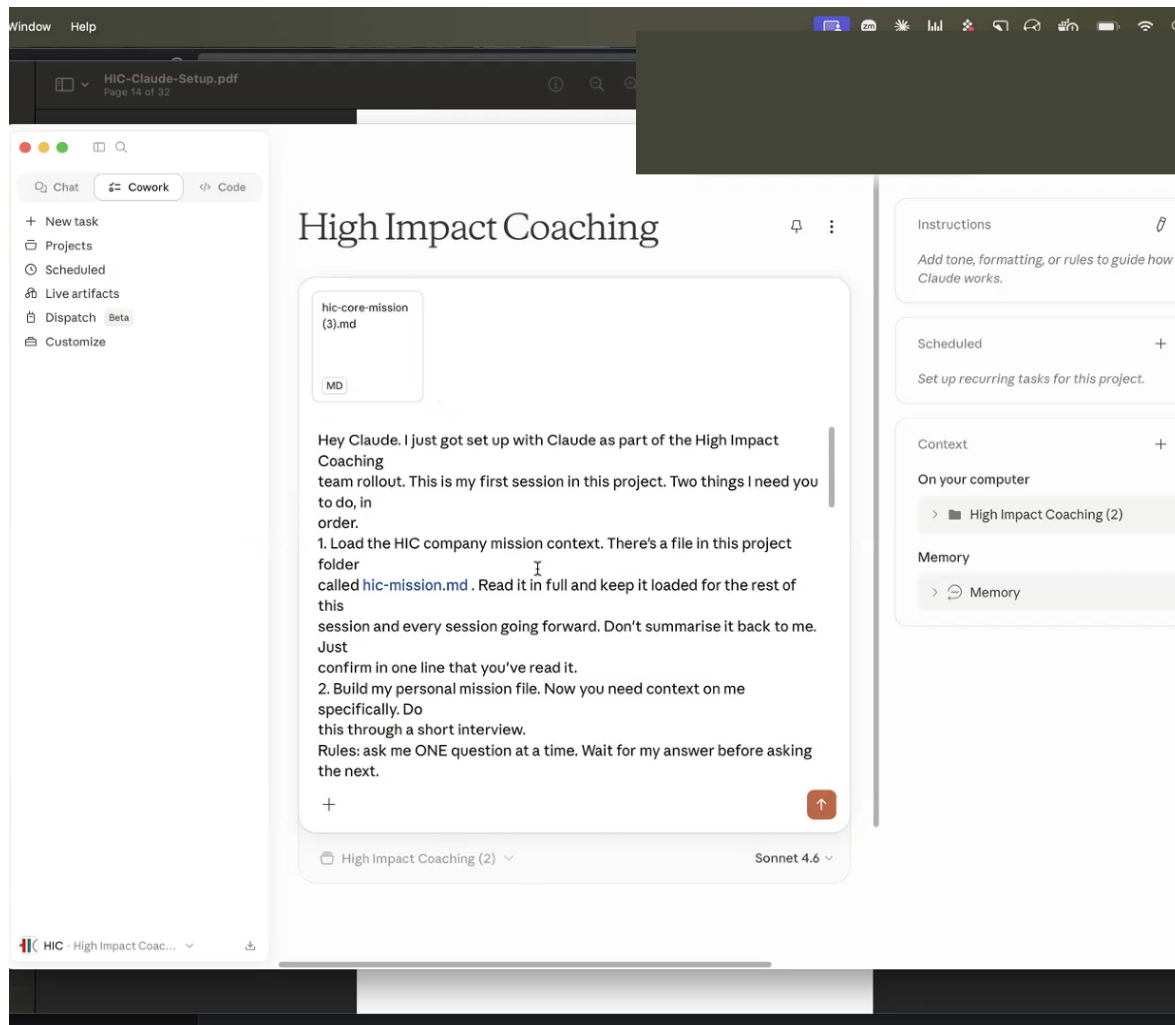
Windows: open File Explorer, navigate to `Documents\HIC`, drag the file in.



This file has everything Claude needs to know about HIC. The clients we serve, our terminology, Zander's voice, the products we sell. Once it's in the folder, Claude can read it.

Step A11. Paste the starter prompt

Go back to the Claude app. Click into the empty chat for your High Impact Coaching project. Copy the full prompt below, paste it as your first message, then hit send.



↓ COPY EVERYTHING INSIDE THIS BOX ↓

Hey Claude. I just got set up with Claude as part of the High Impact Coaching team rollout. This is my first session in this project. Two things I need you to do, in order.

1. Load the HIC company mission context. *There's a file in this project folder called `hic-mission.md`. Read it in full and keep it loaded for the rest of this session and every session going forward. Don't summarise it back to me. Just confirm in one line that you've read it.*

2. Build my personal mission file. Now you need context on me specifically. Do this through a short interview.

Rules: ask me ONE question at a time. Wait for my answer before asking the next. Keep questions short and direct. 8 to 10 questions total.

Cover these topics, in an order that flows naturally:

1. My full name and role at HIC. (You'll need my first name for the file path, see below.)
2. What a typical week looks like (recurring tasks).
3. What I'm working on this month.
4. Who I work with most closely (names + roles).
5. Tools I use every day.
6. How I like to communicate (short/direct, casual/formal).
7. What I want to get better at this quarter.
8. What I want you to help me with specifically.
9. Anything I should never do (words to avoid, formats I hate).
10. Anything else worth knowing.

After my last answer, do this in order:

1. Create a folder inside this project: `{FirstName}/personal/` (replace `{FirstName}` with my actual first name, e.g. `Nikita/personal/`).
2. Save my answers to `{FirstName}/personal/mission.md` with sections: Role, Recurring tasks, Current projects, People, Tools, Communication style, What I want help with, Boundaries, Notes.
3. Create a `CLAUDE.md` file in the project root if one doesn't exist. If a `CLAUDE.md` already exists, update it with the content below (don't replace existing instructions, add these alongside them). This is your main brain. Write it with these contents:

```
"# CLAUDE.md: HIC Project Brain
```

At the start of every session in this project, read these files in full:

1. `hic-mission.md`, Company mission context: clients, terminology, Zander's voice, products.
2. `{FirstName}/personal/mission.md`, Personal context: my role, recurring tasks, communication style, tools, people, preferences.

These files are the project's main brain. Reference them every time you answer.

Update `{FirstName}/personal/mission.md` whenever I tell you something new about my role, my preferences, or my work. Don't ask before updating, just do it and mention it briefly."

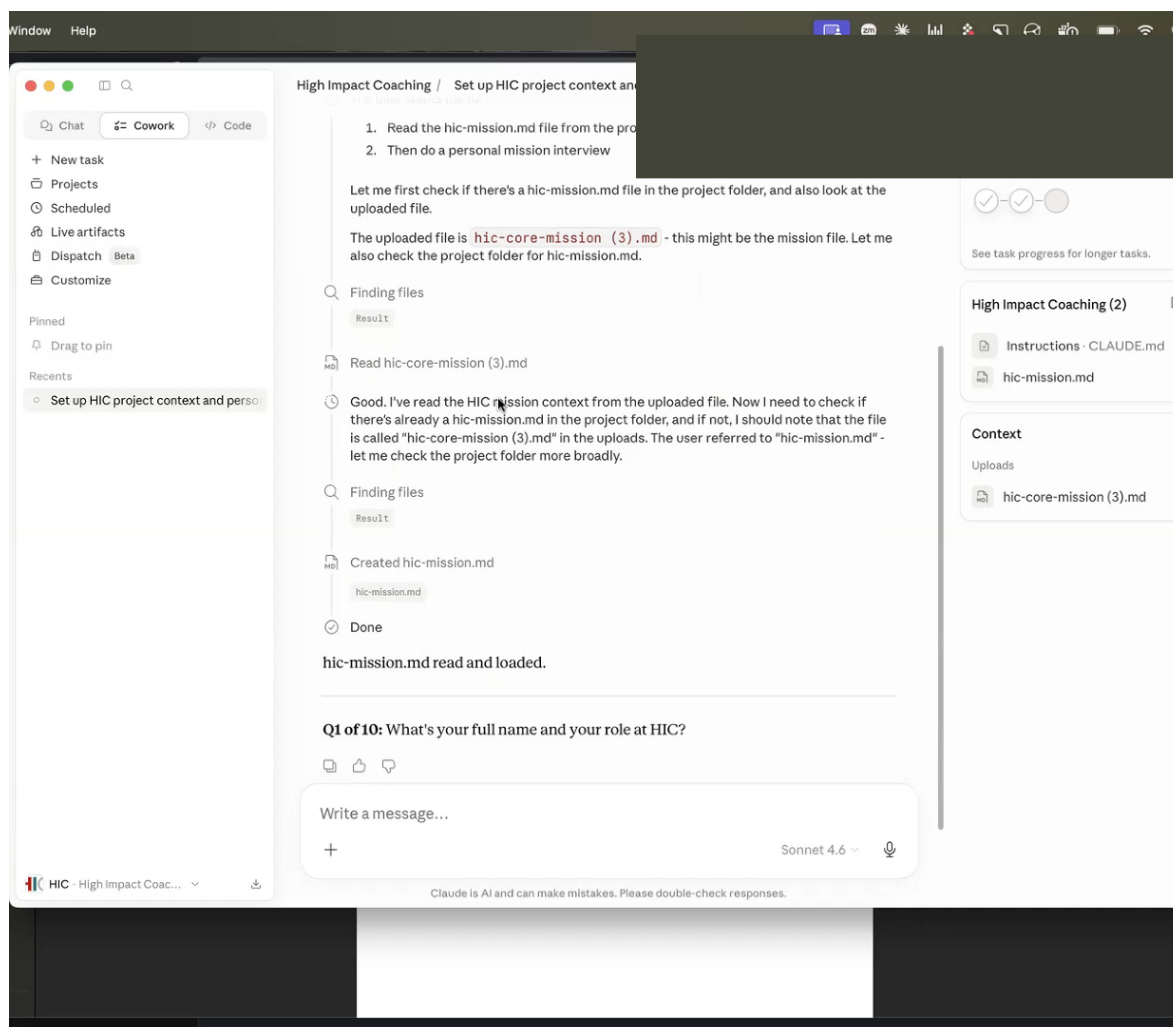
Once those files are saved, confirm and we're done.

OK, start by confirming you've read `hic-mission.md`, then ask me question 1.

Send the message. Claude takes it from there.

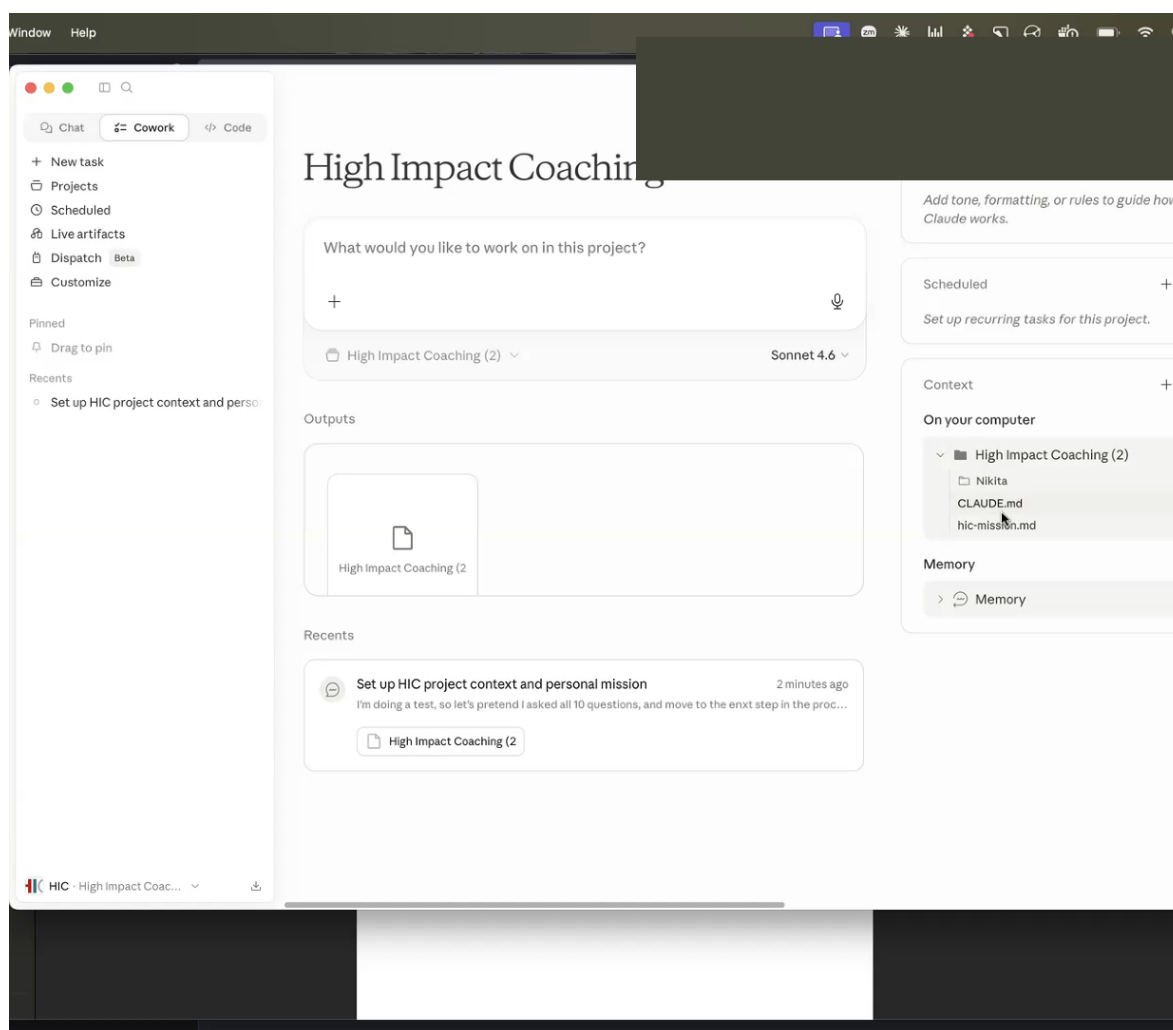
Step A12. Answer Claude's questions

Claude reads the company mission file, then asks you 8-10 short questions about your role and how you work. One at a time. Answer them honestly.



When you're done, Claude saves your answers to `{YourFirstName}/personal/mission.md` and creates or updates `CLAUDE.md` in the project root so it points at both files. Those three files together (`hic-mission.md`, `CLAUDE.md`, your personal mission) are your project's main brain from now on.

Double-check your project folder. In the right sidebar, expand **Context** → **On your computer** → **High Impact Coaching**. You should see all three files listed. If something's missing, ask Claude in the chat: *"Did you save all three files? Show me what's in the project folder."*



You're set

You should now have:

- Claude installed on your laptop
- A folder on your computer (e.g. `~/Documents/HIC` on Mac or `Documents\HIC` on Windows) containing:
 - `hic-mission.md`, the company mission
 - `CLAUDE.md`, the main brain pointer file
 - `{YourFirstName}/personal/mission.md`, your personal context
- An open Cwork project that knows the company AND knows your role

Skip to [Where to get help](#) at the end.

Path B: Already have a Claude account

Most of you are already on Claude under a `@zanderfryer.com` work email or a personal one. We're moving you onto the HIC Team plan. We want to bring across your HIC and work-related context, but leave anything personal on your old account.

Quick check: if your existing account is purely personal (no HIC content, no work projects), skip the rest of Path B. Jump to [Path A](#) and follow it from Step A1, your old personal account stays as it is.

Step B1. Accept the team invite

Open the email from Anthropic and click **Accept invite**. This adds you to the HIC Team plan but doesn't change your existing account just yet.

Step B2. Quit and restart the Claude app

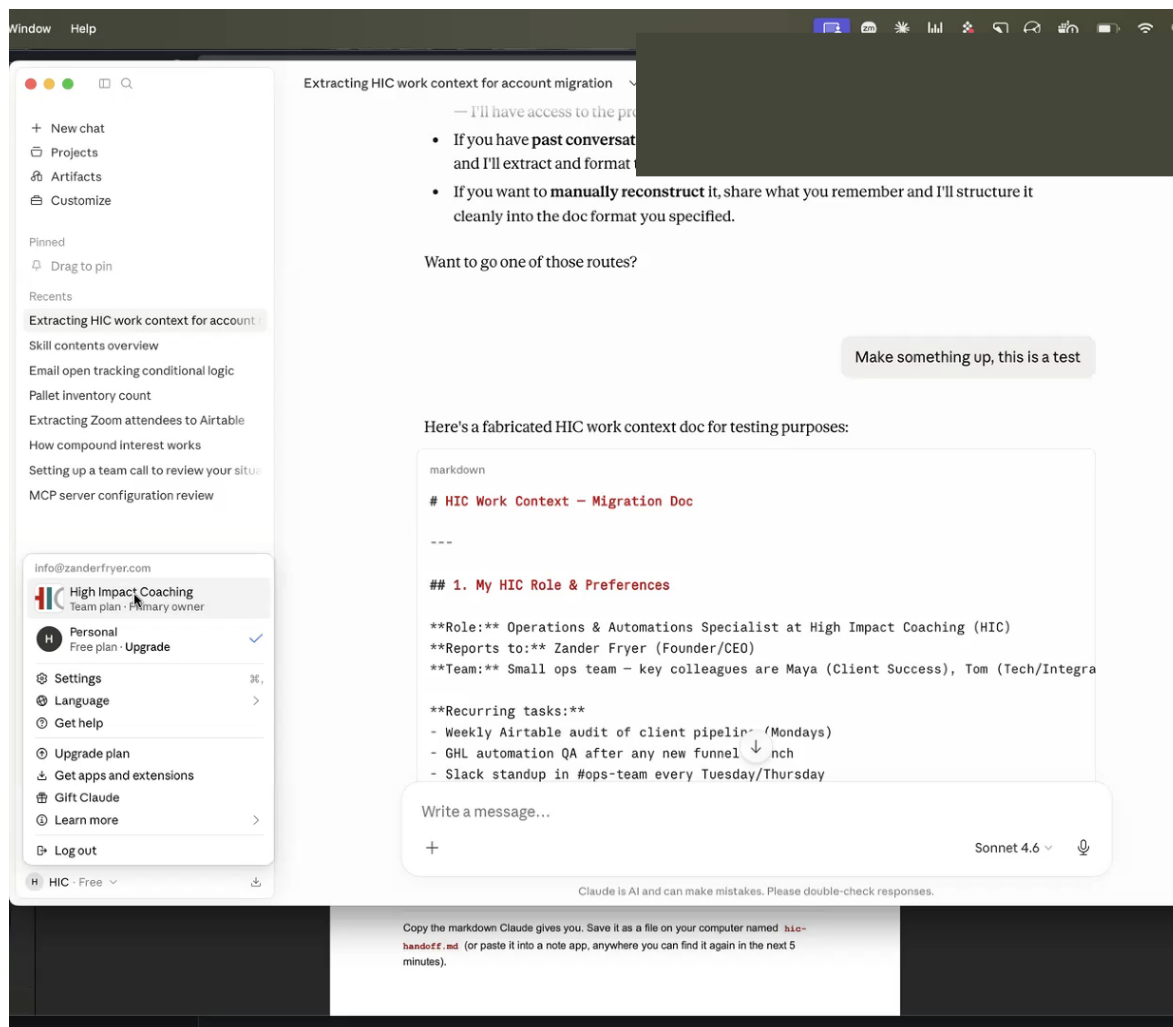
Important: the new HIC account won't show up in the app until you fully restart it.

Mac: with Claude open, press `Cmd+Q` (or click Claude in the menu bar → Quit Claude). Don't just close the window, that doesn't quit it. Then re-open the app.

Windows: right-click the Claude icon in the taskbar → Close window. Or open Task Manager and end the Claude process. Then re-open the app from the Start menu.

Step B3. Click your name in the bottom-left

In the app, click your name (or avatar) in the bottom-left corner. You'll see a dropdown listing both your **personal account** AND your new **High Impact Coaching** account.



This is the account switcher. You'll use it twice in the next few steps.

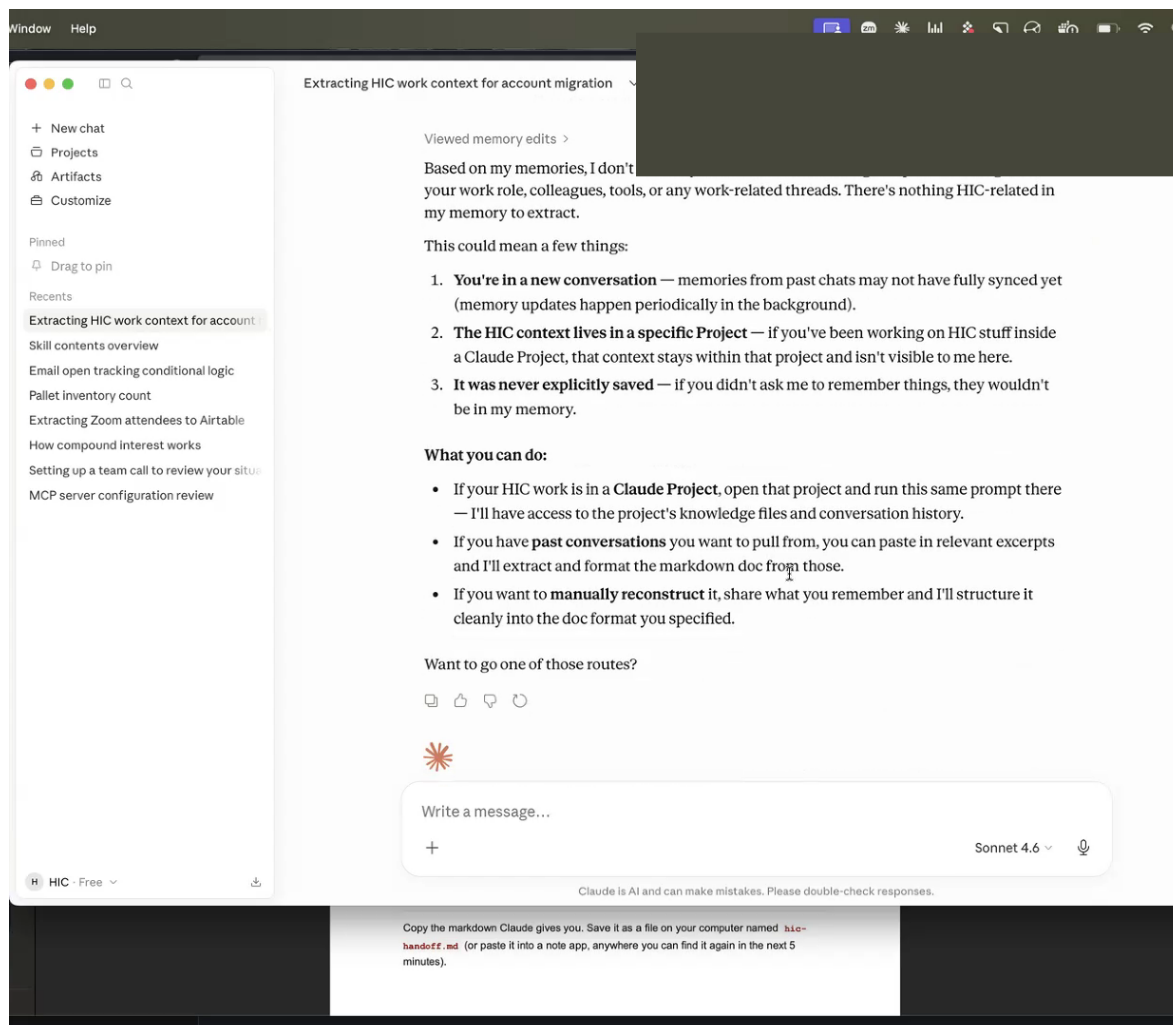
Step B4. Stay on (or switch back to) your OLD account

Before doing anything on the new HIC account, you need to grab your existing HIC context from the OLD account. Make sure you're on your old account (the one with your existing HIC projects).

If you just restarted and you're already on the old account, perfect. If not, click the account switcher (Step B3) and select the old account.

Step B5. Open one of your existing HIC projects

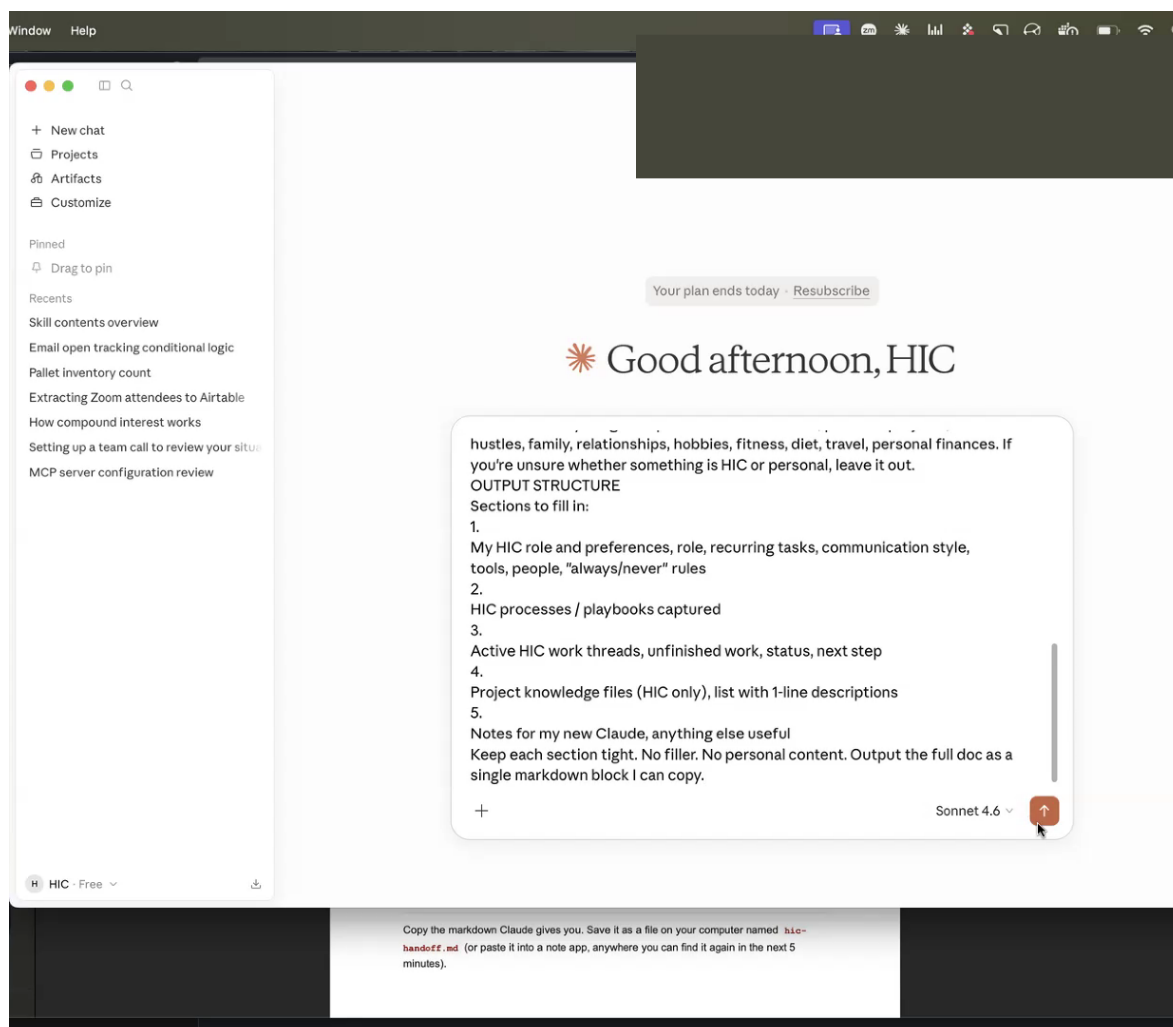
On your old account, open a Claude project that has HIC or work content. Skip projects that are purely personal.



One project is usually enough. The handoff prompt below extracts your role, preferences, and "always/never" rules from your conversation history with Claude, that's the main brain you want to bring over. The most recent or most active project usually has the best context. If you have multiple HIC projects you really want to bring over, repeat for each.

Step B6. Paste the handoff prompt

In your old HIC project, paste the prompt below as a new message. Hit send. Wait for Claude's response.



↓ **COPY EVERYTHING INSIDE THIS BOX** ↓

Hey Claude, I'm migrating my work setup to a new Claude account on the High Impact Coaching (HIC) team plan. Before I switch, extract ONLY my HIC and work-related context from this project. Personal stuff stays here.

Output a single markdown doc with these sections. If a section has nothing work-related, write "Nothing HIC-related in this project" and move on. Do not pad sections with personal content.

SCOPE FILTER

Include only:

- *Anything about High Impact Coaching, HIC, or its products (HIC Launch, Accelerator, Scale)*
- *My role, my team, my colleagues at work*
- *HIC clients, coaches we work with, or our coaching audience*
- *HIC tools (GHL, Airtable, Slack, Zoom, OnceHub, PipeDrive, Circle, Vimeo, Vercel, etc.)*
- *HIC processes, SOPs, automations, or workflows*
- *Zander Fryer, the team, or company strategy*
- *Work projects, tasks, or initiatives we've been collaborating on*

EXCLUDE everything else: personal conversations, personal projects, side hustles, family, relationships, hobbies, fitness, diet, travel, personal finances. If you're unsure whether something is HIC or personal, leave it out.

OUTPUT STRUCTURE

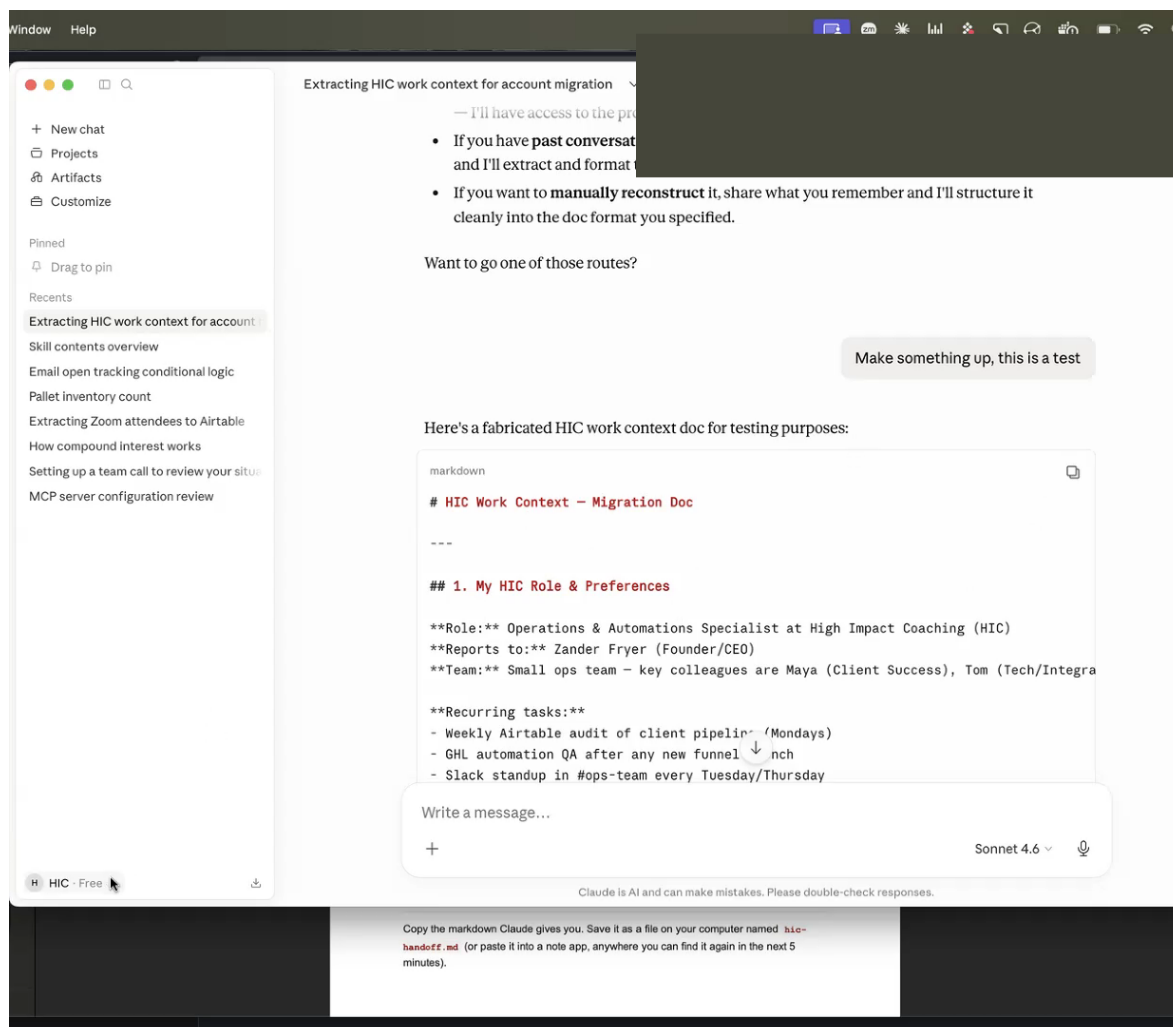
Sections to fill in:

- 1. My HIC role and preferences, role, recurring tasks, communication style, tools, people, "always/never" rules*
- 2. HIC processes / playbooks captured*
- 3. Active HIC work threads, unfinished work, status, next step*
- 4. Project knowledge files (HIC only), list with 1-line descriptions*
- 5. Notes for my new Claude, anything else useful*

Keep each section tight. No filler. No personal content. Output the full doc as a single markdown block I can copy.

Step B7. Save Claude's output

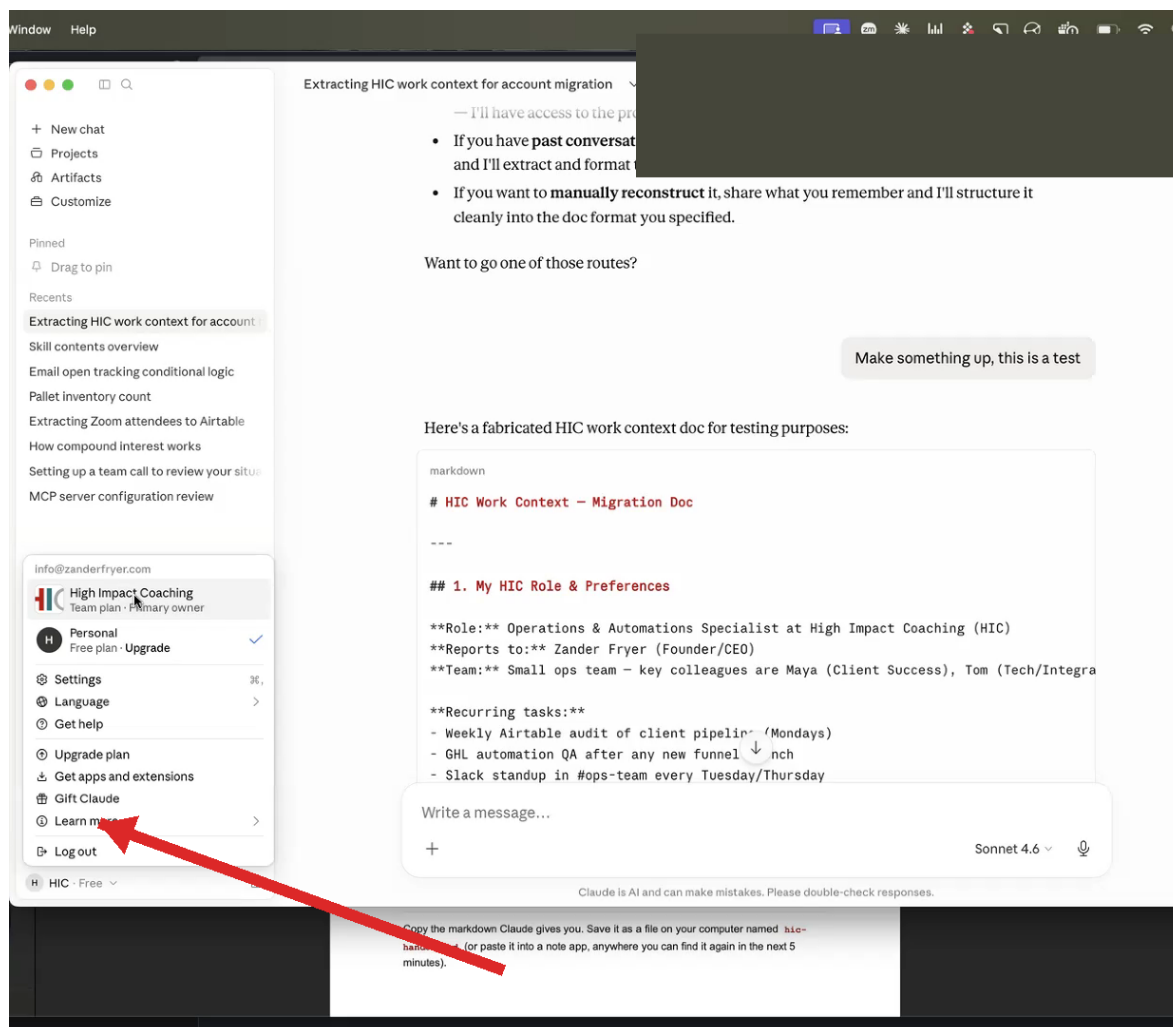
Copy the markdown Claude gives you. Save it as a file on your computer named `hic-handoff.md` (or paste it into a note app, anywhere you can find it again in the next 5 minutes).



If you ran the handoff on multiple projects, save each output separately (`hic-handoff-1.md`, `hic-handoff-2.md`, etc.). Don't worry about your old account, it stays alive, you can always log back in later if you need to look something up.

Step B8. Switch to the new High Impact Coaching account

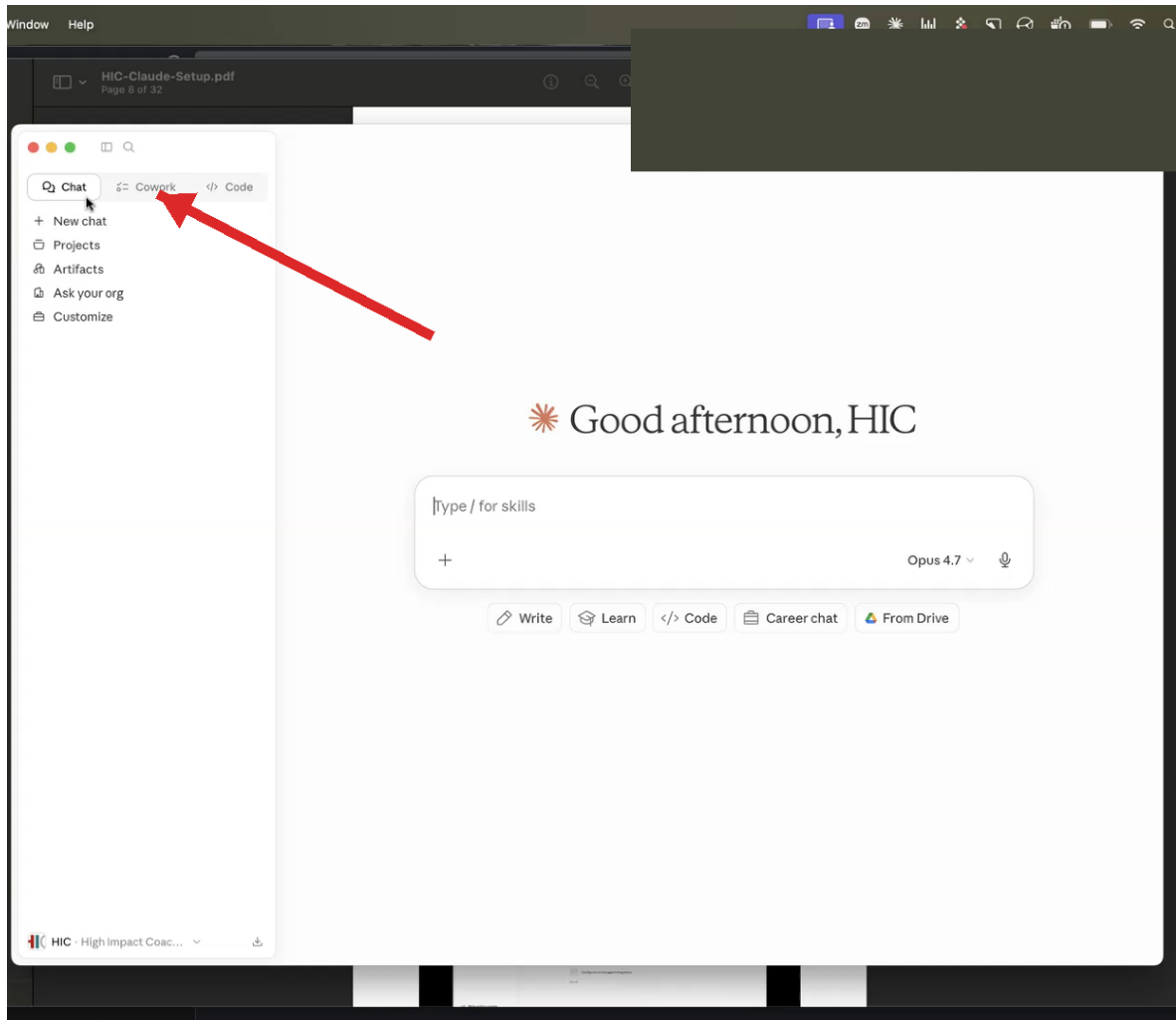
Click your name in the bottom-left again. This time, select the **High Impact Coaching** account.



You're now on the new Team-plan account. Time to set up your project.

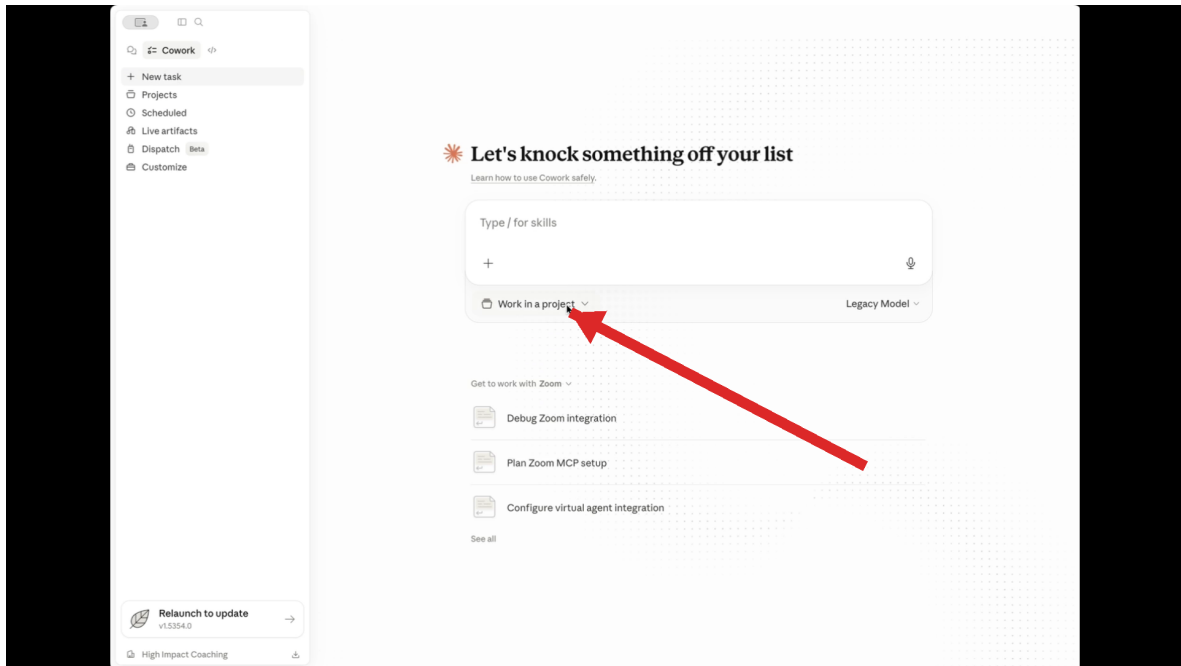
Step B9. Click the Cowork button

Same as in Path A. The Cowork button is in the middle of the home screen.



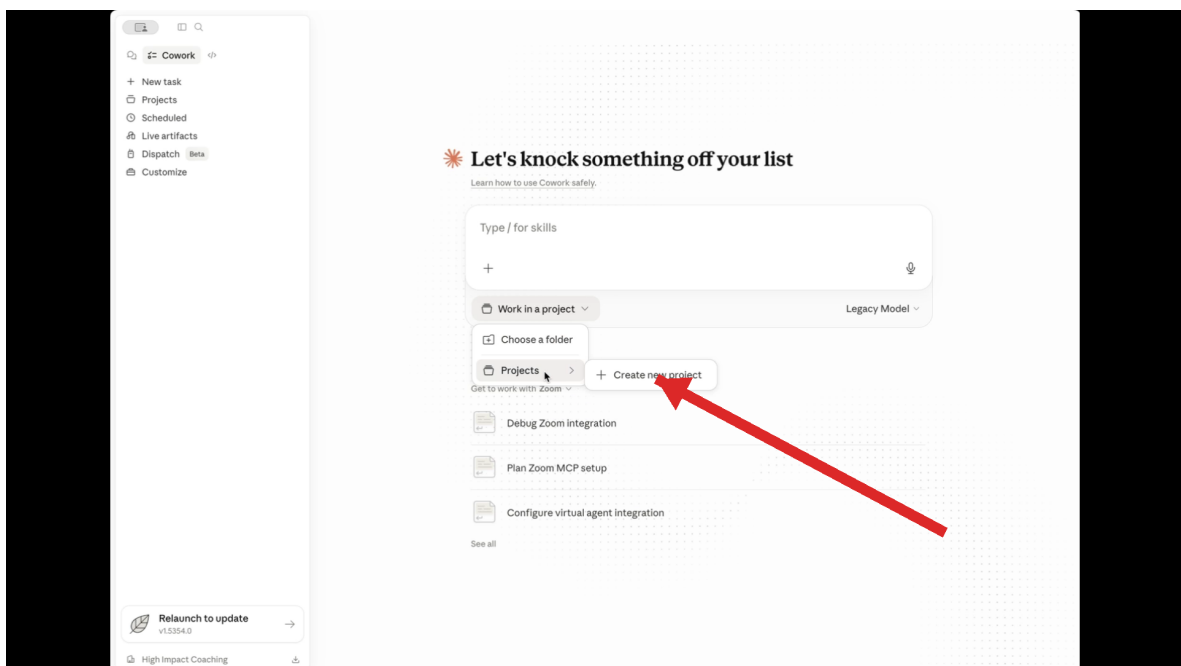
Step B10. Click "Work in a project"

In the chat input box, click **Work in a project**.



Step B11. Click "+ Create new project"

Hover over **Projects**, then click **+ Create new project**.

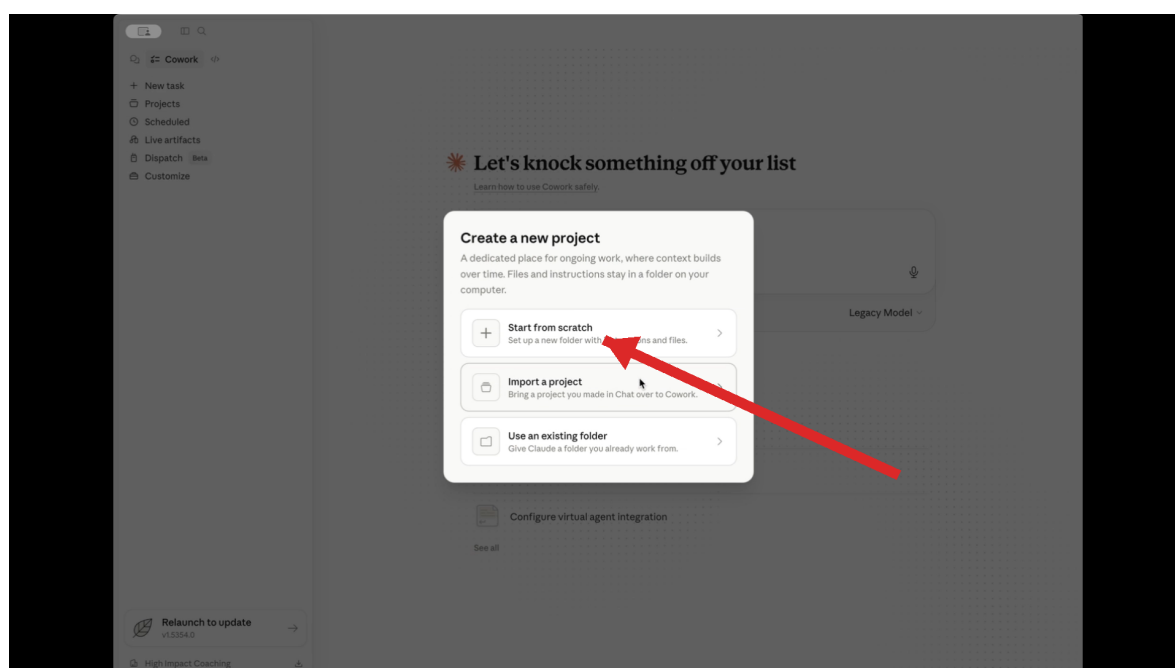


Step B12. Click "Start from scratch" (or use existing folder)

A modal pops up with three options. There are two paths:

Already have a HIC folder on your laptop? If you've worked with HIC files before and have an existing folder you want to keep using, click **Use an existing folder** and pick that folder. Skip Step B13 and continue from Step B14.

Otherwise, click **Start from scratch** and continue with Step B13 below.

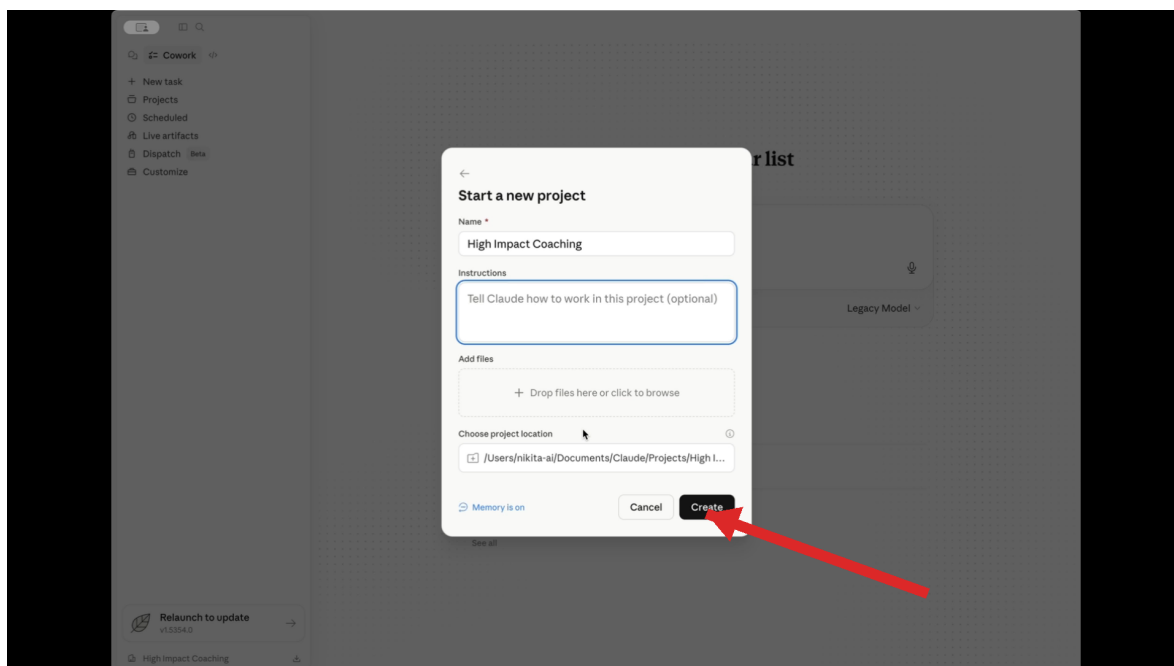


Step B13. Name it and pick a folder

Name the project **High Impact Coaching**. Pick a folder location on your computer.

Mac: recommended path is `~/Documents/HIC`

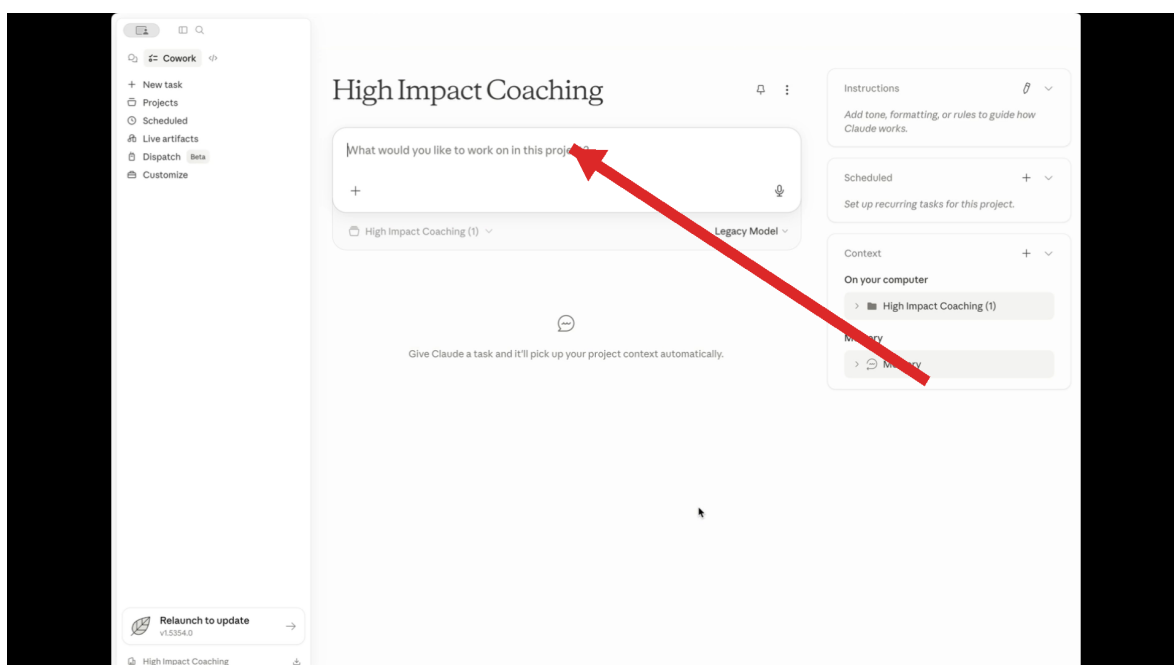
Windows: recommended path is `Documents\HIC` (under your user folder)



Click **Create**.

Step B14. You should see an empty chat

Your new High Impact Coaching project is set up. Don't type anything yet.

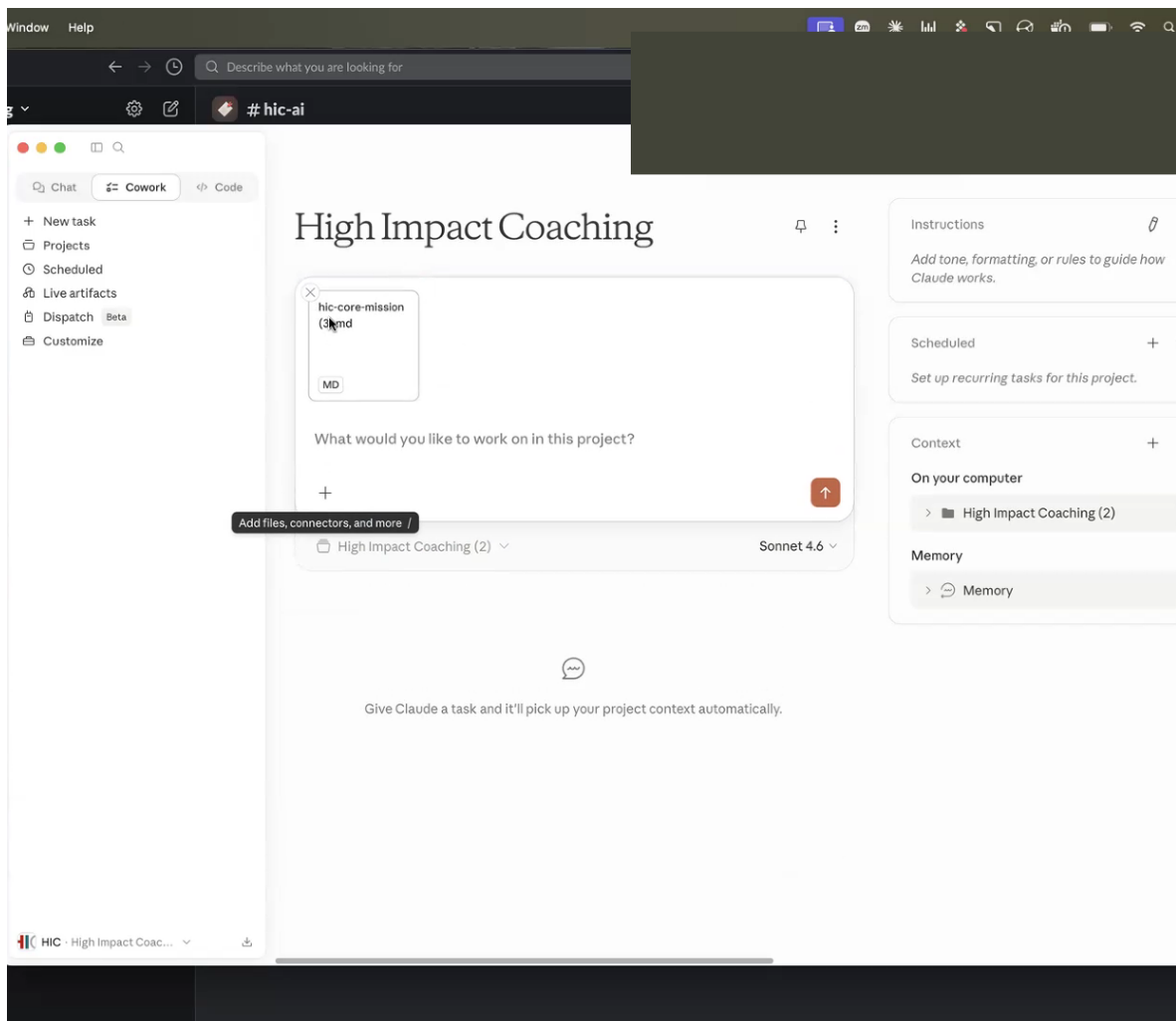


Step B15. Drop in the HIC mission file AND your handoff doc(s)

The `hic-mission.md` file is sent by Zander or the Operations team and pinned at the top of `#hic-ai` in Slack. Download it from there.

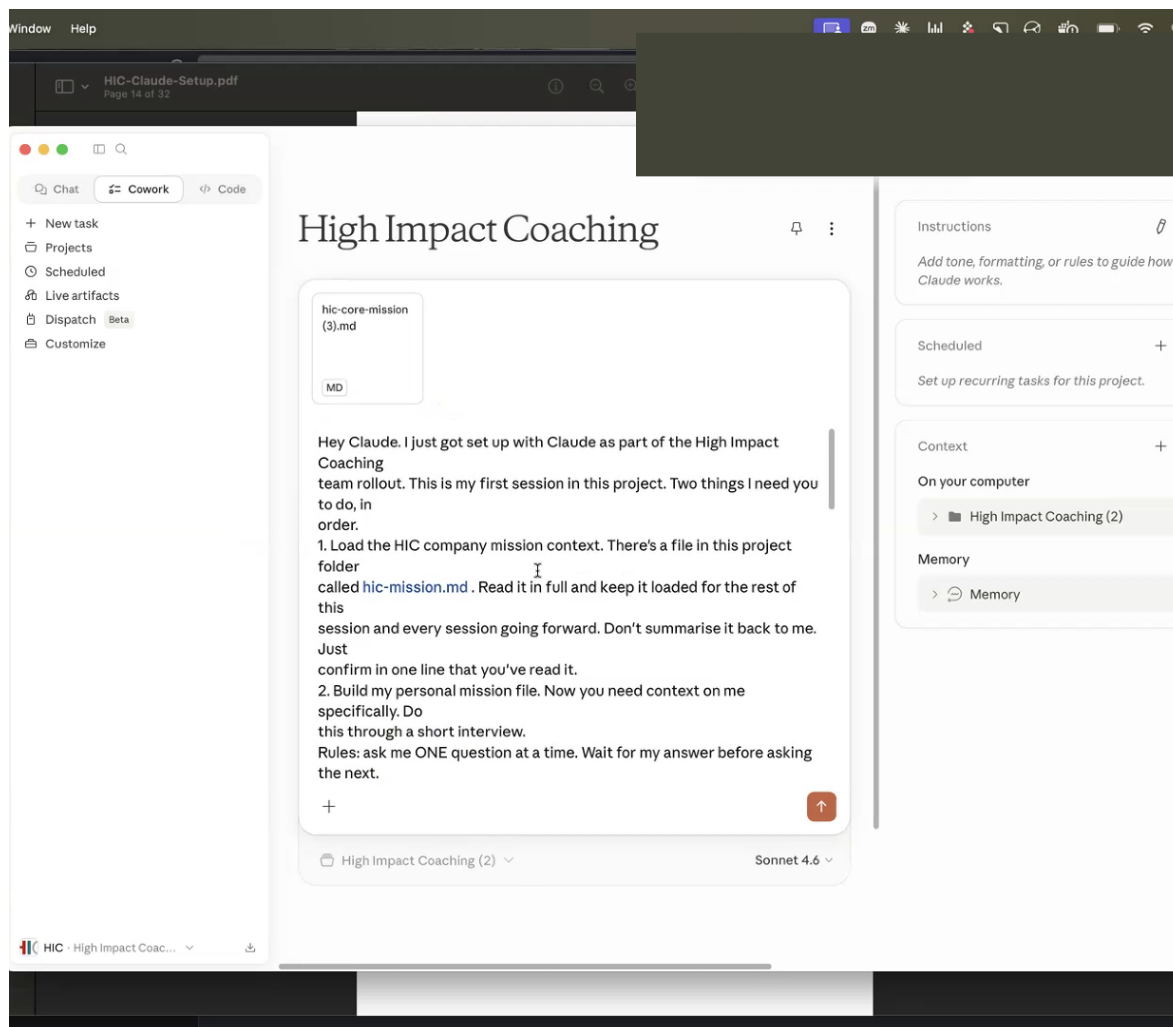
Open the project folder you picked in Step B13. Drop in:

- `hic-mission.md` , the company mission file from `#hic-ai`
- `hic-handoff.md` , your handoff doc(s) from Step B7. If you have multiple, drop them all in.



Step B16. Paste the migration starter prompt

Go back to the Claude app, click into the empty chat for your new project, and paste the prompt below.



↓ COPY EVERYTHING INSIDE THIS BOX ↓

Hey Claude. I just got set up with Claude as part of the High Impact Coaching team rollout, and I'm migrating from a previous Claude account. This is my first session in this project. Three things I need you to do, in order.

1. Load the HIC company mission context. *There's a file in this project folder called `hic-mission.md`. Read it in full and keep it loaded for the rest of this session and every session going forward.*

2. Load my personal handoff context. There are also handoff doc(s) in this project folder named `hic-handoff.md` (or similar). Read them, they contain my HIC-related context that I extracted from my previous Claude account.

3. Build my personal mission file with as few questions as possible.

First, pre-fill what you already know from the handoff doc(s), role, recurring tasks, tools, people, communication style, "always/never" rules, anything I've mentioned before. Don't ask me about things you can already infer.

Then ask me ONE question at a time for anything you can't figure out from the handoff. Use the same set of topics below as a checklist, but only ask the ones you don't already know the answer to. Keep questions short and direct. Aim for 2 to 6 follow-up questions.

Topics to cover (skip the ones the handoff already answers):

1. My full name and role at HIC. (You'll need my first name for the file path.)
2. What a typical week looks like (recurring tasks).
3. What I'm working on this month.
4. Who I work with most closely (names + roles).
5. Tools I use every day.
6. How I like to communicate (short/direct, casual/formal).
7. What I want to get better at this quarter.
8. What I want you to help me with specifically.
9. Anything I should never do (words to avoid, formats I hate).
10. Anything else worth knowing.

After my last answer, do this in order:

1. Create a folder inside this project: `{FirstName}/personal/` (replace `{FirstName}` with my actual first name, e.g. `Nikita/personal/`).
2. Save my full personal mission to `{FirstName}/personal/mission.md` with sections: Role, Recurring tasks, Current projects, People, Tools, Communication style, What I want help with, Boundaries, Notes.
3. Create a `CLAUDE.md` file in the project root if one doesn't exist. If a `CLAUDE.md` already exists, update it with the content below (don't replace existing instructions, add these alongside them):

```
"# CLAUDE.md: HIC Project Brain
```

At the start of every session in this project, read these files in full:

1. `hic-mission.md` , *Company mission context: clients, terminology, Zander's voice, products.*
2. `hic-handoff.md` , *Personal HIC context migrated from my previous Claude account.*
3. `{FirstName}/personal/mission.md` , *Personal context: my role, recurring tasks, communication style, tools, people, preferences.*

These files are the project's main brain. Reference them every time you answer.

Update `{FirstName}/personal/mission.md` whenever I tell you something new about my role, my preferences, or my work. Don't ask before updating, just do it and mention it briefly."

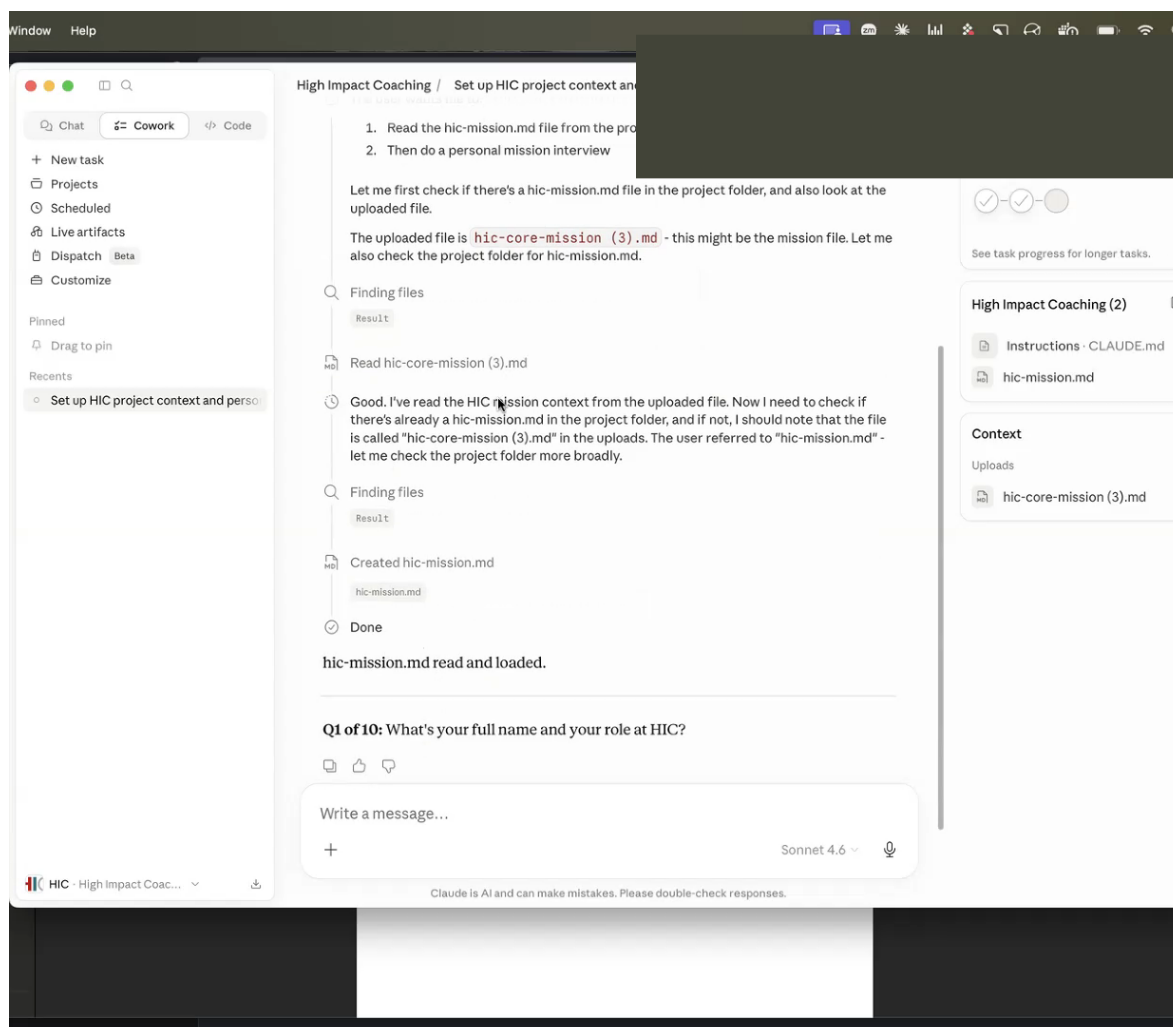
Once those files are saved, confirm and we're done.

OK, start by reading `hic-mission.md` and the handoff doc(s), then tell me what you've already pre-filled and what questions you still need answered.

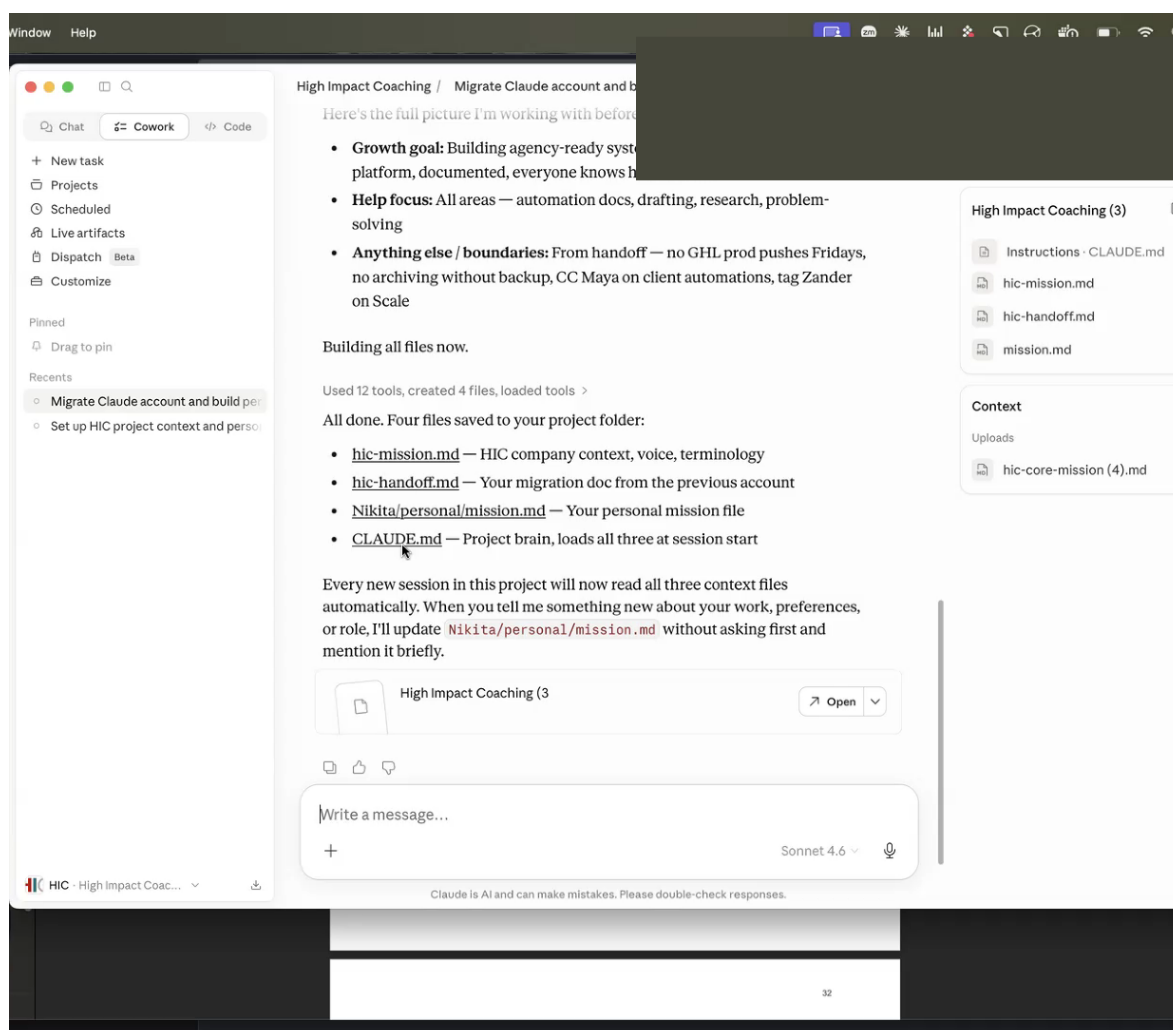
Send the message. Claude reads everything and starts the short follow-up interview.

Step B17. Answer Claude's remaining questions

Claude already has a lot from the handoff doc, so this is a much shorter interview than someone starting from scratch, usually 2 to 6 questions. Answer them, and Claude saves the final `mission.md` plus the `CLAUDE.md` pointer file.



Double-check your project folder. When Claude wraps up the migration, it lists every file it saved. You should see all four files mentioned. If anything looks off, ask in the chat: *"Did you save all four files? List what's in the project folder."*



You're set (Path B)

You should now have:

- Claude installed on your laptop
- A folder on your computer (e.g. `~/Documents/HIC` on Mac or `Documents\HIC` on Windows) containing:
 - `hic-mission.md` , the company mission
 - `hic-handoff.md` , your migrated context from the old account
 - `CLAUDE.md` , the main brain pointer file
 - `{YourFirstName}/personal/mission.md` , your personal context
- An open Cowork project on the HIC Team account that knows the company, knows your role, AND has continuity from your previous Claude account
- Your old account left intact for personal use

Where to get help: the #hic-ai Slack channel

Pinned at the top of #hic-ai:

- The latest `hic-mission.md` (the company mission file). If we update it, the new version gets reposted here. Drop the new file into your project folder to replace the old one.
- A sample `mission.md` template you can reference.
- This setup guide.

Stuck on a step? Post in the channel and tag **@operations**. Someone on the team will jump in. No question is too small, if it's broken for you, it's probably broken for someone else too.

Welcome to the team. Let's build some awesome shit.