

The AI Setup Checklist

Get Claude or ChatGPT set up properly, and safely, in under 30 minutes. Tick each box as you go.

1. Choose your AI (2 minutes)

- ☐ I've chosen: ☐ ChatGPT (best all-rounder, great with pictures) ☐ Claude (brilliant writer, great with documents) ☐ Both
- ☐ I'm starting free. Everything here works on the free versions. Only consider paying (around £20 a month) if you keep hitting limits or it saves you over an hour a month.

2. Create your account (5 minutes)

- ☐ Signed up at chatgpt.com or claude.ai
- ☐ Installed the phone app, and **checked the developer**: *OpenAI* for ChatGPT, *Anthropic* for Claude
- ☐ Logged in on both with the same details

My login email: _____

3. Privacy and security (5 minutes)

Menus change. If you can't find something exactly, look nearby or ask your AI where to find it.

	ChatGPT	Claude
☐ Training : choose whether your chats help train the AI	Settings → Data controls → <i>Improve the model for everyone</i>	Settings → Privacy → <i>Help improve our AI models</i>
☐ Memory : decide on or off (you can change it later)	Settings → Personalization → Memory	Settings → Memory
☐ Two-step verification : on	Settings → Security	On the Google or email account you log in with
☐ Private chats : know where they are	<i>Temporary chat</i>	<i>Incognito chat</i>

4. Tell it about you (5 minutes)

- ☐ Added a short "about me" (ChatGPT: *Personalization* → *Custom instructions*. Claude: *Settings* → *Account* → *Instructions for Claude*)

Copy and change: *I'm a [job/role] in [town]. I'm new to AI. I mostly want help with [emails, planning, letters]. Please use British English, keep answers short and clear, avoid jargon,*

and ask me if anything's unclear.

5. Your first three wins (10 minutes)

Use **W.H.A.T.**: **W**ho you are and who it's for, **H**elp needed, **A**ll the details, **T**one and type.

- ☐ **Win #1, a tricky message:** *"Help me write a short, friendly email to [who] about [what]. The key point is [x]. Under 100 words."* Then ask for a change: *"warmer", "shorter"*.
- ☐ **Win #2, make sense of something:** *"Explain this letter in plain English. What do I need to do, and by when?"* (Cover account numbers first.)
- ☐ **Win #3, plan something:** *"Here's everything on my plate this week: [list]. Turn it into a realistic day-by-day plan."*

6. The traffic-light rule

-  **Go:** everyday questions, drafts, general info about you
 -  **Think first:** work documents (check your employer's policy), other people's details, health specifics
 -  **Never:** passwords, PINs, codes, bank card or account numbers, NI or passport numbers
- ☐ **I'll double-check anything important.** AI can be confidently wrong.

 **Bonus: your free taster Course Pack.** Attach the file from your email to a new chat and type **Start**. Your AI becomes your personal tutor for 20 minutes.

Rather not do it yourself? The Setup Pack gets your AI to set itself up around you.
deadeasyai.com/setup-pack