
THE AI ESTATE AGENT

You do what earns commission.
The AI does everything else.

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THE PROBLEM

You Are Drowning in Admin

A typical UK estate agent arrives at the office by 8:30am. By 9am they have already dealt with overnight portal enquiries, chased a solicitor for a chain update, and started writing up property details for a new instruction. By lunchtime they have conducted two viewings, prepared for a valuation, followed up with three cold buyers, updated their CRM, and tried to think of something to post on social media. By 5pm they are drafting vendor updates, negotiating an offer, and writing yet another listing from scratch.

Most of that day was spent on tasks that do not directly earn commission. The listing copywriting, the follow-up emails, the vendor updates, the viewing notes, the market reports, the social media posts — these are essential, but they are not the activities that win instructions or close deals. They are the admin that surrounds the deal.

This guide gives you two things: **ready-to-use prompts** you can paste into any AI tool today to get immediate results, and **a complete system** for turning those prompts into a permanent AI assistant that knows your agency, your area, and your voice. Whether you use Claude, ChatGPT, or have never touched AI in your life, this guide meets you where you are.

How This Guide Works

Each chapter focuses on one task that eats your time. For each task you get: the pain point (why it matters), a complete prompt you can copy and paste right now, a worked example with real UK data, and instructions for making it permanent using Claude's Cowork system so you never have to set it up again. Start with the task that wastes the most of your day.

What You Need

To use the prompts immediately: A free account at claude.ai or chatgpt.com. That is it.

To build the full system: A Claude Pro subscription (~\$20/month, approx. 16/month) and the Claude Desktop app (free download from claude.ai/download). Chapter 2 walks you through setup.

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CHAPTER 01

Getting Set Up

This chapter gets you from zero to a working AI assistant in about 30 minutes. If you already have a Claude account, skip to the Cowork section.

Option A: Just the Prompts (Free, 2 Minutes)

Go to claude.ai or chatgpt.com and create a free account. You can now copy any prompt from this guide, paste it in, fill in your details, and get instant results. This works perfectly for occasional use.

Option B: The Full System (Paid, 30 Minutes)

For agents who want AI built into their daily workflow — where Claude remembers your brand, your area, and your preferences permanently — you need Cowork:

1. Sign up at claude.ai

Create an account with your email or Google sign-in.

2. Upgrade to Pro (\$20/month)

Click your profile icon, select 'Upgrade to Pro', and enter your card details.

3. Download Claude Desktop

Go to claude.ai/download. Install the app (Mac or Windows). Open it and sign in.

4. Switch to Cowork

Click the 'Cowork' tab at the top of the app. This is your AI workspace.

5. Create your workspace folder

On your computer, create a folder called "Estate Agency AI" in your Documents. Inside it, create subfolders: Listings, Follow-Ups, Reports, Social, Compliance, Templates.

6. Connect the folder

In Cowork, select your new folder as the working directory.

Which plan? Start with Pro at ~16/month. It gives you everything in this guide. Only upgrade to Max (80/month) if you find yourself hitting daily limits — most agents never will.

CHAPTER 02

Your Agency Context Files

Context files are the single highest-impact thing you can do. They are simple text documents you place in your workspace folder. Claude reads them before every task, so it always knows who you are, how you write, and what your area is like. You write them once. Claude uses them forever.

Create three files using any text editor (Notepad, TextEdit, or even Word — just save as .md). Place them in your "Estate Agency AI" folder.

File 1: about-my-agency.md

```
# About My Agency
Agency: [Your agency name]
Location: [Your town/city]
Speciality: Residential sales in [your postcodes]
Typical price range: [e.g. 350K - 1.2M]
Team size: [e.g. 4 negotiators, 1 manager, 1 admin]
Target clients: [e.g. London relocators, local upsizers]
Portals: Rightmove, Zoopla, OnTheMarket
CRM: [e.g. Street, Alto, Reapit, Jupix]
```

File 2: my-writing-style.md

```
# How I Write
Tone: Professional but warm. Local expert, not corporate chain.
Listings: Lifestyle-led. Sell the feeling, not the spec sheet.
Emails: Direct, concise, always use client's first name.
Social media: Friendly, knowledgeable, not salesy.
BANNED WORDS: 'Stunning', 'Must-see', 'Dream home', 'Boasts',
'Don't miss out', 'Breathtaking', 'Turnkey', 'Oasis'.
Sign emails with my first name. Keep paragraphs short.
```

File 3: my-local-area.md

```
# My Local Area
Key selling points: [e.g. Cathedral city, 20 mins to London]
Popular areas: [list your most active streets/neighbourhoods]
Schools that drive prices: [list key catchments]
Transport: [station names, journey times, motorway access]
Amenities buyers ask about: [parks, restaurants, shops]
Current market: [one-line summary of conditions]
```

Why this matters: Without context files, every AI output sounds generic. With them, every listing mentions your actual schools, every email signs off in your name, and every market report references your real data. This is the difference between AI that feels like a gimmick and AI that feels like a properly briefed junior negotiator.

CHAPTER 03

Property Listings

THE PAIN POINT

You write the same type of listing dozens of times a year. Each one takes 20-40 minutes: staring at a blank screen, trying to make a 3-bed semi sound different from the last 3-bed semi. Meanwhile, 15 other agents' listings on Rightmove all start with 'This stunning property...'

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a luxury property copywriter. Write a listing that makes the buyer feel they already live in the home.

RULES:

- Start with a 2-sentence hook about what it FEELS like to live here at a specific time of day. Not features.
- Walk the reader through the home room by room.
- Include a section on the local area (2-3 sentences).
- End with a confident, quiet closing line. No urgency cliches.
- BANNED: 'Stunning', 'Must-see', 'Dream home', 'Boasts'.
- Include bed/bath/reception count naturally in the text.
- Under 300 words.

Property: [FULL PROPERTY DETAILS]

Area: [NEIGHBOURHOOD AND KEY AMENITIES]

Ideal buyer: [WHO WOULD LOVE THIS HOME AND WHY]

After the listing, give me:

- 3 email subject lines for my buyer list (under 8 words)
- 1 Instagram caption (under 150 characters, no hashtags)

WHAT YOU WILL GET BACK

A complete listing (under 300 words) with a lifestyle hook, room-by-room walkthrough, local area section, and closing line. Plus 3 email subject lines and an Instagram caption. Ready to paste into Rightmove, Zoopla, your website, or an email.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: In Cowork, type: 'Create a custom Skill called Property Listing Writer that follows these exact rules every time I ask you to write a listing.' Claude will build and install it. From then on, just say 'Write a listing for 14 Orchard Lane' and it uses your rules automatically.

PRO TIP

The more specific your buyer description, the better the copy. 'Young family' gets generic text. '38-year-old architect, two kids under 5, moving from Islington, wants a village feel with fast London commute' gets copy that reads like it was written personally for that buyer.

CHAPTER 04

Buyer Follow-Ups

THE PAIN POINT

A buyer viewed a property three days ago and has gone completely silent. You know you need to follow up, but 'Just checking in!' emails scream desperation and push them further away. Meanwhile, you have six other cold leads who also need chasing and the day is already full.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a confident estate agent who values your time.
Write a 4-sentence message to a buyer who has gone silent.

APPROACH:

- Acknowledge their silence without guilt-tripping.
- Mention that another buyer is now showing interest in the property — state this as fact, not threat.
- Reference the specific feature they loved to make it personal.
- End with: 'If I don't hear back, no worries — I'll assume you've moved on.'
- Must sound like it was typed quickly on a phone.
- No formal greetings or sign-offs.
- NEVER use 'Just checking in' or 'opportunity'.

Buyer: [NAME]

Property: [ADDRESS]

Feature they loved: [SPECIFIC DETAIL]

Days since viewing: [NUMBER]

WHAT YOU WILL GET BACK

A 4-sentence message ready to send as a text, WhatsApp, or quick email. It sounds natural and confident — like you genuinely have other buyers interested and you are doing them a courtesy, not chasing them.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill called 'Cold Lead Follow-Up' that generates these messages. Then batch your cold leads: 'Write follow-ups for Sarah (Orchard Lane, loved the kitchen, 3 days), James (Elm Close, loved the garden, 5 days), and the Patels (Maple Drive, loved the schools, 7 days).' Three messages in one go.

PRO TIP

Send these as texts or WhatsApp, not emails. The casual, phone-typed tone only works if it arrives on their phone. An email with this wording looks odd. A text message looks completely natural.

CHAPTER 05

Vendor Updates

THE PAIN POINT

Every active vendor expects a weekly update. With 15 live instructions, that is 15 personalised emails every Friday afternoon — each one referencing viewings, feedback, portal statistics, and next steps. It takes over an hour and it is always the task that gets pushed to 6pm.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a professional estate agent writing a weekly vendor update email. Be honest, data-driven, and supportive.

STRUCTURE:

1. Greeting using their first name.
2. This week's activity: viewings conducted, enquiries received, portal views if available.
3. Feedback summary: what buyers said (good and bad).
4. Market context: one line on current local conditions.
5. Next steps: what you are doing next week.
6. Warm sign-off with your name.

RULES:

- Honest, not spin. If there was no interest, say so with a constructive recommendation.
- Under 200 words. Vendors are busy too.
- Never use 'fingers crossed' or 'hopefully'.

Vendor: [NAME]

Property: [ADDRESS]

This week: [VIEWINGS, ENQUIRIES, FEEDBACK – BULLET POINTS]

Portal stats: [RIGHTMOVE VIEWS IF KNOWN]

My recommended next step: [YOUR RECOMMENDATION]

WHAT YOU WILL GET BACK

A professional, honest vendor update email (under 200 words) personalised with the week's actual activity data. Ready to send. If you batch all 15 vendors into one Cowork task, you get all 15 emails in about 3 minutes.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill called 'Friday Vendor Updates'. Then set it as a **scheduled task** every Friday at 3pm. Give Claude your vendor list and a simple update spreadsheet each week. It drafts all the emails while you are out doing viewings.

PRO TIP

The Friday batch: Instead of writing each email individually, give Claude all your vendors' details at once: 'Write vendor updates for all of these properties using this week's viewing notes.' One task, 15 personalised emails, 3 minutes.

CHAPTER 06

Market Reports

THE PAIN POINT

Homeowners ignore generic 'How is the market?' emails. But they always open an email that tells them exactly what their home is worth right now — especially when a neighbour just sold. The problem is creating those reports takes 30 minutes of research and writing for each one.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a market analyst who writes like a financial advisor, not an estate agent. Create a neighbourhood market update.

STRUCTURE:

1. **Headline:** data-led, attention-grabbing.
2. **Benchmark sale:** what this specific sale means for neighbouring values.
3. **Market speed:** what days-on-market and stock levels signal.
4. **One clear, time-bound recommendation.**
5. **Offer a free valuation. No pressure.**

RULES:

- Every claim must reference a specific number.
- No superlatives. Let the data speak.
- Bold the key metrics.
- Under 250 words.

Area: [POSTCODE/NEIGHBOURHOOD]

Recent sale: [ADDRESS] sold for [PRICE]

Average days on market: [DAYS]

Year-on-year price change: [PERCENTAGE]

Current stock levels: [MONTHS OF SUPPLY]

WHAT YOU WILL GET BACK

A sharp, data-driven market update email with bold metrics, a clear recommendation, and a soft valuation offer. Ready to send to homeowners in the target area.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill called 'Market Alpha Report'. Use it every time a notable sale completes in your area. Timing is everything — send it within 48 hours of the sale while the neighbours are still talking about it.

PRO TIP

This is your best prospecting tool. Send these to every homeowner on the street where the sale just happened. You are not selling. You are providing valuable information. The valuation enquiries come naturally.

CHAPTER 07

Valuation Preparation

THE PAIN POINT

You have a valuation at 4pm. It is currently 3:30pm and you have been in back-to-back viewings all afternoon. You need to walk in looking like you have done your homework on the street, the comparables, and the property — but you have had no time to prepare.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a senior estate agent preparing for a market appraisal. Create a pre-valuation briefing pack.

INCLUDE:

1. Property summary from the details provided.
2. List of 5 comparable sales I should research (similar type, size, and location – suggest specific streets).
3. Key questions to ask the vendor (why selling, timeline, previous agents, price expectations, condition issues).
4. Draft post-valuation covering letter with space for my price recommendation.

RULES:

- Keep each section concise – this is a reference doc, not an essay.
- The covering letter should be warm and professional.
- Under 400 words total.

Property: [ADDRESS AND BASIC DETAILS]

Area: [NEIGHBOURHOOD]

Vendor name: [NAME]

WHAT YOU WILL GET BACK

A one-page briefing pack with the property summary, comparable sale suggestions, vendor questions, and a draft covering letter. Print it or read it on your phone in the car before you knock on the door.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill called 'Valuation Prep Pack'. Connect your Google Calendar, and every morning Claude can check your diary and automatically prepare briefing packs for any valuations scheduled that day.

PRO TIP

Pair this with your local area context file. Claude already knows your schools, transport links, and popular streets. The briefing pack will reference them automatically, making you sound like the undisputed local expert.

CHAPTER 08

Social Media Content

THE PAIN POINT

Social media is always the task that gets pushed to 'later'. You know you should be posting consistently — your competitors are — but after a full day of viewings, valuations, and vendor calls, writing Instagram captions feels impossible.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are a social media manager for a local estate agency.
Create 5 posts for this week across Instagram and Facebook.

MIX (one of each):

1. New listing teaser (curiosity, not full details).
2. Local area tip (a hidden gem or useful insider knowledge).
3. Market insight (one interesting stat, made accessible).
4. Behind-the-scenes / day in the life moment.
5. Advice post (tips for buyers, sellers, or movers).

RULES:

- Captions under 150 characters each.
- Friendly, knowledgeable tone. Never salesy.
- Include a suggested image description for each post.
- No hashtags in the caption (I add those separately).
- No emojis unless they add genuine value.

My agency: [NAME]

My area: [LOCATION]

This week's new listing (if any): [BRIEF DETAILS]

Any local news or events: [IF APPLICABLE]

WHAT YOU WILL GET BACK

Five social media posts with captions and image descriptions. Copy them into your scheduling tool (Later, Buffer, Hootsuite, or the Meta Business Suite) on Monday morning and you are set for the week.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill and set it as a **scheduled task** every Sunday evening. Claude creates next week's posts automatically. You review them on Monday morning and schedule them. Total time: 5 minutes per week instead of never getting around to it.

PRO TIP

Consistency beats quality. Five decent posts every week beats one perfect post every three weeks. The algorithm rewards regular posting, and your audience rewards showing up. Let AI handle the consistency; you add the personality.

CHAPTER 09

Viewing Notes

THE PAIN POINT

You have just done four viewings. You have rough notes scribbled on your phone — 'liked the kitchen, worried about the garden, partner wasn't sure about the third bedroom, wants to think about it.' You need to turn these into structured notes for your CRM before you forget the details, but it is 5:30pm and you just want to go home.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are an estate agent writing a structured viewing report for your CRM. Turn my rough notes into a clean record.

FORMAT:

- Property: [auto-fill from notes]
- Date: [today]
- Buyer: [name]
- Overall reaction: [positive/mixed/negative]
- Room-by-room feedback: [from my notes]
- Key concerns raised: [from my notes]
- Interest level: HOT / WARM / COLD
- Recommended next step: [your suggestion]

RULES:

- Professional language, but keep it concise.
- Flag any objections that need addressing.
- Under 150 words per report.

My rough notes:

[PASTE YOUR ROUGH NOTES HERE — bullet points, fragments, voice memos transcribed, anything]

WHAT YOU WILL GET BACK

A clean, structured viewing report ready to paste into your CRM. If you batch all four viewings into one request, you get all four reports in under a minute.

MAKE IT PERMANENT (COWORK USERS)

To make this permanent: Create a Skill called 'Viewing Report'. At the end of every day, dump all your rough viewing notes into one Cowork task. Claude formats them all. Copy into your CRM. Done in 2 minutes instead of 20.

PRO TIP

Use voice notes. After each viewing, record a 30-second voice memo on your phone with your raw impressions. Use your phone's transcription feature to turn it into text, then paste it into Claude. This is faster than typing and captures more detail while it is still fresh.

CHAPTER 10

Difficult Conversations

THE PAIN POINT

The two hardest conversations in estate agency: telling a vendor their home is overpriced, and handling a buyer who says 'We are going to wait until rates drop.' In both cases, arguing makes it worse. You need data-led scripts that shift the conversation from opinion to evidence.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

SCENARIO A — PRICE REDUCTION:

You are a data-driven estate agent. Draft an email to a vendor who needs to reduce their price.

- Lead with data: [SHOWINGS] viewings, [OFFERS] offers in [DAYS] days.
- The market's silence IS the counter-offer.
- Reference comparable: [COMP ADDRESS] sold for [COMP PRICE].
- Present two options: adjust the price now, or watch the listing go stale.
- Never apologise. Be supportive but definitive.
- Under 200 words.

SCENARIO B — INTEREST RATE OBJECTION:

Write a phone script for a buyer who says 'We will wait until rates drop.'

- Validate their concern first.
- Explain demand-side effect: when rates drop, sidelined buyers flood back, pushing prices up.
- Use their target price [PRICE] and local growth rate [RATE] to show cost of waiting.
- 'You can refinance a rate. You cannot undo a purchase price.'
- Short sentences. Under 200 words.

WHAT YOU WILL GET BACK

Two ready-to-use scripts: a price reduction email that lets the market data be the bad guy (not you), and a phone script that reframes the interest rate conversation with actual maths instead of opinions.

MAKE IT PERMANENT (COWORK USERS)

To make permanent: Create two separate Skills — 'Price Reduction Email' and 'Rate Reframe Script'. When the situation arises, just give Claude the numbers and it builds the conversation for you.

PRO TIP

For price reductions: Always send the email first, then follow up with a phone call the same day. The email softens the ground with data. The call closes the conversation with empathy. Together they work far better than either alone.

CHAPTER 11

Winning New Instructions

THE PAIN POINT

There are three types of sellers sitting in your area right now who have not been reached by the right agent: homeowners on the street where a sale just happened, owners whose listing just expired with another agent, and private sellers trying to sell without an agent. All three need a different approach.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

APPROACH 1 — OFF-MARKET LETTER:

Write a 150-word handwritten-style letter to homeowners on [STREET]. I have a vetted buyer ([BUYER DESCRIPTION]) who wants this exact street. Offer a quiet, off-market sale.

Tone: private, personal, never salesy.

APPROACH 2 — EXPIRED LISTING:

Write a 120-word letter to [OWNER] whose property at [ADDRESS] sat for [DAYS] days at [PRICE] and did not sell.

Diagnose what probably went wrong ([ISSUE: pricing/photos/marketing]) without blaming the previous agent. Offer a free Market Repositioning Report.

APPROACH 3 — PRIVATE SELLER:

Write a 150-word approach for [OWNER] at [ADDRESS] who is selling privately at [PRICE]. Respect their decision. Ask 2-3 questions they haven't considered (inspection liability, contract terms, buyer verification). Offer a free 'second opinion' chat. Never say 'you need an agent.'

WHAT YOU WILL GET BACK

Three distinct, ready-to-send letters/messages, each tailored to a different type of seller and a different psychological approach. The off-market letter sounds private. The expired listing letter diagnoses. The FSBO message asks questions that create doubt.

MAKE IT PERMANENT (COWORK USERS)

To make permanent: Create three separate Skills. When a listing expires in your area, when you spot a FSBO, or when a notable sale completes, you just type the address and Claude produces the outreach immediately.

PRO TIP

For off-market letters: Print on plain, quality paper. Handwrite the envelope. Response rates double when it does not look like marketing. For expired listings: approach on the same day the listing comes off. Speed is everything — 50 other agents will call that homeowner within 24 hours.

CHAPTER 12

The Referral System

THE PAIN POINT

Most agents disappear after completion. No contact for months, then a random 'Do you know anyone looking to buy?' email that goes straight in the bin. The agents who win repeat business stay in touch with genuine value — and they never ask directly for referrals.

THE PROMPT — COPY, PASTE, AND FILL IN YOUR DETAILS

You are an estate agent who treats past clients like VIPs.

TASK 1 – 30-DAY CHECK-IN:

Write a 150-word email to [CLIENT] who completed [WEEKS] ago. Ask about [SPECIFIC REPAIR THEY MENTIONED]. Introduce your 'Trusted Contractor Network' – they now get access to your vetted plumbers, electricians, and builders. Frame the referral as a VIP perk: 'If anyone you know is struggling with their search, send them my way – I always carve out extra time for friends of past clients.'

TASK 2 – ANNUAL EQUITY UPDATE:

Write a 200-word email to [CLIENT] at [ADDRESS]. They paid [PURCHASE PRICE]. Current estimated value: [CURRENT VALUE]. Equity gained: [GAIN]. Include one line on local market trend. Soft referral line. Sign off with [YOUR NAME].

WHAT YOU WILL GET BACK

Two emails: a 30-day check-in that delivers genuine value (the contractor network) and plants the referral seed naturally, and an annual equity update that reminds every past client what their home is now worth and keeps you top-of-mind.

MAKE IT PERMANENT (COWORK USERS)

To make permanent: Create two Skills and schedule them. The 30-day check-in runs automatically based on your completion dates. The annual equity update runs once a year for every past client. Set it and forget it — the referrals come to you.

PRO TIP

Pair the annual equity update with a small gesture. A bottle of wine or a handwritten card arriving with a personalised equity report creates a moment your client talks about. That conversation is where referrals actually happen.

CHAPTER 13

Your Daily Routine

Here is how the complete system fits into a typical day:

Before 9am (In the Office)

Open Cowork. Say: *'Triage my overnight emails. Draft replies to all buyer enquiries and flag anything urgent from solicitors.'* While that runs, check your diary. Say: *'Prepare valuation packs for my appointments today.'* By the time you have had your coffee, your inbox is triaged and your valuations are prepped.

Midday (Between Viewings)

From your phone: *'Write the listing for the instruction I took this morning at 22 Elm Close. 3-bed semi, south-facing garden, refurbished kitchen, 5 mins walk to the station. Target buyer is a young couple relocating from London.'* By the time you are back at your desk, the listing copy is in your folder.

Late Afternoon (Back at the Desk)

Dump your rough viewing notes from the day into Cowork: *'Turn these into structured viewing reports for my CRM.'* Then: *'Write follow-up emails for every buyer I saw today who seemed warm or cold.'* Two tasks, ten minutes, an hour of work done.

Friday Afternoon

This is already scheduled. Claude drafts your vendor updates automatically. You review them, tweak anything that needs your personal touch, and send. 15 personalised vendor emails in 10 minutes instead of 90.

The Golden Rule

AI writes the first draft. You add the last 10%.

Your local knowledge, your client relationships, and your professional judgement are what separate you from every other agent in your postcode. Cowork handles the writing, the admin, and the preparation — so you can spend your time doing the things that actually earn your commission.

Quick Reference

Resource	Where
Claude account	claude.ai

Claude Desktop app	claude.ai/download
Pro plan (~16/month)	Settings > Upgrade
Cowork	Top tab in Claude Desktop
Skills setup	Settings > Customize > Skills
Connectors (Gmail, Drive)	Settings > Connectors
Help & support	support.claude.com