

DAILY BRIEFING SETUP GUIDE

Wake up to a briefing that's actually useful

This is the exact process RJ demonstrated in Week 1. In about 10 minutes, you'll have a daily briefing that pulls news, tools, and action items tailored to YOU. No coding required.

PART 1: THE FIRST BRIEFING

Step 1: Open Claude (Desktop or Web)

Use **Cowork** mode if you're on Desktop -- it's the magic middle between Chat and Code. Any mode will work though.

Step 2: Tell Claude what you want

Type something like:

"I want a daily briefing. Give me space to share what I'd like to focus on. Then pull everything together and give me a clear picture of my day -- what's coming up, what needs attention, and any action items I should know about."

Step 3: Answer the focus question

Claude will ask what you want your briefings to focus on. Be specific about YOUR audience and needs:

"Practical tools and news that matters to [YOUR FIELD]. I work with [YOUR AUDIENCE]. Give me stuff we can actually use."

Examples: entrepreneurs, fiction writers, coaches, teachers, small business owners, parents...

Step 4: Review what it gives you

Claude will generate your first briefing. Look through it and note:

- What do I love? (Keep it)
- What do I not care about? (Cut it)
- What's missing? (Add it)

PART 2: REFINE IT

Step 5: Tell Claude what to change

This is the iteration. RJ's actual refinements included:

"Please never mention [TOPIC YOU HATE]. Love the compliance/legal section -- keep that. Could you put live links everywhere so I can click through? I love the 'so what' section -- why does this matter to my people?"

Step 6: Feed it documents about YOU

Want it tailored even more? Drop in documents about your audience, your values, your writing style. Say:

"Here are some documents about me and my audience. Read them, then rebuild the briefing with this context."

The more it knows about you, the better the briefing gets. This is what Claude.md is for!

Step 7: Ask for a rebuild

When you're ready, just say: "Rebuild it, please." Review again. Repeat until you love it.

PART 3: MAKE IT AUTOMATIC

Step 8: Schedule it

When the briefing looks good, Claude will ask if you want it to run automatically. Say:

"Yes! Schedule it to run every morning at [YOUR TIME]. I want it ready when I sit down."

Step 9: Connect your tools (optional)

Go to Settings > Connectors to connect things like:

- **Google Calendar** -- pulls your schedule into the briefing
- **Gmail** -- surfaces important emails
- **Slack** -- catches messages you missed
- **Google Drive** -- references your documents

You don't **NEED** any connections for the briefing to work. But they make it richer.

REMEMBER

- This is YOUR briefing. If something doesn't serve you, cut it.
- The first version is never the final version. Iterate!
- Be specific about WHO it's for and WHAT you'll do with it.
- If Claude drifts, say "read Claude.md again" and refocus.

"The more it knows about you, the better the briefing gets."