

Aug 2, 2026

Configuring Claude to actually do things

Summary

Session covered optimizing artificial intelligence workflows via Claude tools, integrations, and strategic industry automation limitations.

Claude Configuration and Capabilities

Optimized interactions through system instructions, memory features, and project structures improved context management. These methods enhanced productivity across professional documentation tasks.

Workflow Automation and Integration

Connectors enable task orchestration across email, calendars, and accounting platforms. These tools allow for hands-free professional scheduling and efficient data management.

Strategic Software Market Outlook

Participants determined that creating independent software to compete with established industry platforms is not economically viable. Automated workflows remain the primary method for increasing operational efficiency.

Next steps

- ☐ [Randal Tait] Share setup content: Distribute the setup instructions for Claude to all attendees to facilitate implementation without manual copying or video referencing.

- ❑ [Timothy Beevor] Send Starlink referral: Send a referral link to Randal Tait to help address his current internet connectivity issues.
- ❑ [Randal Tait] Share Humanizer Skill: Provide the instruction text for the humanizer skill so that group members can copy and paste it into their own configurations.

Details

- **Introduction and Background:** Randal Tait introduced their background as an engineer who manages two businesses, one focused on industrial design for mining equipment and another on AI implementation. Randal Tait expressed appreciation for the classes taught by Timothy Beevor, which enabled the development of the AI business.
- **Claude Chat vs. Claude Code:** Randal Tait distinguished between Claude Code, which runs locally on a user's machine, and Claude Chat, which runs on Anthropic's cloud servers. Randal Tait emphasized that Claude Chat offers superior accessibility, allowing users to maintain conversation history and context across multiple devices such as PCs, tablets, and phones.
- **Desktop Application Interface:** Randal Tait noted that the Claude desktop app combines "chat" and "co-work" functions. Randal Tait cautioned users to select "chat" specifically to ensure interactions are saved in the cloud, as "co-work" operates locally and is not accessible from other devices.
- **Customizing Claude with System Instructions:** Randal Tait demonstrated using the "Instructions for Claude" setting to tailor responses. By inputting specific directives—such as requesting direct answers, requiring logical justifications, and asking Claude to challenge assumptions—Randal Tait achieved more efficient and tailored outputs. Additionally, Randal Tait uses these settings to have Claude generate specific Claude MD files, which improves the performance of subsequent coding tasks.
- **Utilizing the Memory Feature:** Randal Tait explained that the "Memory" feature allows Claude to retain information across different chat sessions. By manually adding details to this memory, users can ensure Claude applies relevant context about their business or personal preferences to future interactions, resulting in more personalized responses.

- **Managing Context with Projects:** Randal Tait discussed using "Projects" for complex, ongoing tasks. To overcome context window limitations, Randal Tait creates "handover" Markdown files at the end of a chat, which are then uploaded to a new project to provide seamless continuity for the next session.
- **Managing Complex Documentation:** Randal Tait demonstrated how to upload multiple PDF manuals for farming equipment into a single project. This approach allows Claude to synthesize information across documents without consuming the entire context window, providing users with quick access to specific maintenance data via voice while working in the field.
- **Summary of Claude Chat Capabilities:** Randal Tait reiterated that the presentation focused on Claude Chat rather than Claude Code. Timothy Beevor emphasized the importance of flexibility, advising that system prompts and project setups can be adapted to specific student or professional situations rather than being limited to a single method.
- **Educational Use Cases:** Timothy Beevor suggested that students can use Claude Projects to organize academic work. By uploading math textbooks, images, and notes, students can create a personalized chatbot tailored to their specific curriculum.
- **Introduction to Connectors:** Randal Tait introduced "Connectors," which allow Claude to integrate with external platforms like Google Calendar, Gmail, and Zero. Randal Tait noted that these connections enable Claude to perform tasks such as identifying debtors, drafting emails, and managing schedules.
- **Configuring Connectors:** Randal Tait walked through the process of connecting Gmail and Google Calendar to Claude. Randal Tait noted that because Anthropic and Google have an integration agreement, the connection process is straightforward and utilizes standard login workflows.
- **AI Voice Agents for Business:** Randal Tait explained the implementation of AI voice agents to answer phone calls for trade businesses. These agents can manage appointments, update Google Calendars, and input data into software such as Servicemate, allowing business owners to focus on physical tasks.
- **Customer Reception to AI:** Randal Tait noted that providing live demonstrations—such as calling a landline to trigger a real-time booking update in a calendar and job management software—is the most effective way to demonstrate the value of AI implementation to clients.

- **Efficiency of AI Voice Interaction:** Timothy Beevor and Randal Tait discussed the effectiveness of AI voice interfaces, noting that they often provide a better user experience than human interaction because the AI is direct, keeps asking for information until satisfied, and functions without the latency or repetitive clarifying questions sometimes associated with human communication.
- **Discussion on Infrastructure:** The group held a brief discussion regarding satellite technology, noting that Starlink operates with approximately 10,000 satellites and 25 million customers. They also exchanged details regarding personal travel experiences in the Pine Plains area.
- **Notion Connector Integration:** Timothy Beevor demonstrated the Notion connector, showing how Claude can access and read data from Notion pages. This functionality allows users to summarize documentation, study notes, or website content directly within a Claude chat.
- **Zero Invoicing Workflow:** Randal Tait demonstrated using the Zero connector to pull financial data into Claude. Randal Tait showed how to request a list of debtors and draft follow-up emails in Gmail. Randal Tait noted that the Zero integration is currently read-only, requiring a human to review and authorize the emails before sending.
- **Calendar and Voice Control:** Randal Tait demonstrated how Claude can query and update a calendar. Randal Tait emphasized that users can leverage this functionality via voice command while driving, allowing for rescheduling or sending communications without manual input.
- **Spotify Connector:** Randal Tait demonstrated the Spotify connector, illustrating how Claude can generate music playlists based on user requests, which highlighted the tool's versatility for non-business tasks.
- **Skills and Future Potential:** Randal Tait and Timothy Beevor discussed the "Skills" feature, which applies specific instructions across all Claude platforms. They also identified potential for integrating other connectors like Canva and Nano Banana, with Claude acting as the orchestrator for tasks like image generation, which they noted produces higher-quality results than prompting third-party software directly.
- **Humanizer Skills and Customization:** Randal Tait explains the concept of creating a "humanizer" skill to improve AI-generated content. By defining specific keywords to avoid, they can ensure the output is less "AI-esque" and more conversational. Randal Tait notes that this approach provides greater control than general preferences, allowing users to tailor outputs for specific

needs, such as differentiating the writing style required for proposals versus emails. They provide an example of creating a specific skill that can be cut and pasted into the tool.

- **AI Training and Pre-configured Skills:** Randal Tait discusses how to refine AI performance by training it on past personal content, such as 40 previous emails or proposals, so the AI learns to write in the user's natural style. Furthermore, Randal Tait highlights that users can browse and add pre-configured skills created by Anthropic, such as a "learn" skill for improved Q&A interaction. They encourage participants to explore these tools, noting that it is difficult to damage the system by experimenting with these features.
- **Plugin Functionality:** Randal Tait describes plugins as a combination of skills and connectors, noting that they are available in marketplaces or can be built by partners. Examples mentioned include a PDF viewer capable of filling out forms and research tools like PubMed. Timothy Beevor adds that it is useful to understand these plugins because the AI can automatically invoke them when appropriate, provided the user phrases their request with an awareness of the available tools.
- **Calendar Management and Workflow Orchestration:** Randal Tait demonstrates using Claude to manage calendar tasks, such as moving meetings via voice command, and mentions that they use custom connections to integrate Claude with bespoke engineering software. Timothy Beevor notes that the "orchestration layer"—including the Model Context Protocol (MCP) and connectors—is becoming essential for technology stacks, as understanding these tools allows users to maintain control over automated workflows.
- **Engineering Model Auditing:** Randal Tait details a specific use case where they interact with Claude to perform engineering audits. By uploading a structural engineer's design model, they can instruct Claude to overlay and compare it against their own design model to ensure all steel members comply with the design specifications. Randal Tait states that this voice-activated process replaces a task that previously required hours of manual labor.
- **Integration of Canva and Content Generation:** Timothy Beevor demonstrates using a connected Notion page to generate content, which is then passed to a Canva design skill to create a presentation. David Pham inquires about the comparison between this tool and Claude's native design function. Randal Tait shares that they successfully designed a professional

website by having Claude write the content, generate images through Nano Banana, and handle animations, despite having no prior coding or graphic design background.

- **3D Modeling and Feature Documentation:** Timothy Beevor describes using Fable to analyze a 3D modeling application. Fable took photos of the application, identified the functionality, and generated appropriate imagery to demonstrate features, thereby automating the creation of front-end marketing materials.
- **AI Infrastructure and Workflow Efficiency:** Timothy Beevor emphasizes that the competitive landscape of AI is shifting toward speed, token efficiency, error reduction, and the strength of the "harness" or orchestration layer. Randal Tait discusses integrating Claude with AI voice agents and N8n workflows to manage emails, texts, and communication channels. They note that the introduction of MCP connectors has made it easier to build these complex, automated workflows compared to earlier iterations of such tools.
- **Automated Renovation Quoting:** Randal Tait describes an automated quoting workflow for a bathroom renovator. A client records a site visit via video, which is processed through Telegram and converted into text. The system then extracts pertinent information and links it to Service Mate and Xero to calculate costs based on live supply pricing. This process allows the contractor to provide an accurate quote on-site without needing to manually perform data entry or wait for office time, significantly increasing efficiency.
- **Cost Sourcing and SaaS Viability:** Bruce asks about the source of the cost data in the renovation quoting system, and Randal Tait clarifies that it pulls live pricing from suppliers via Service Mate, ensuring quotes remain current. Regarding the broader software-as-a-service (SaaS) market, Timothy Beevor suggests that companies like Service Mate might innovate internally to include these AI features. Randal Tait concludes that competing directly with these established multinationals is not economically viable, as they already possess a loyal customer base and low subscription costs, meaning the window of opportunity for independent developers to offer these tools as external services is closing.

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