

Let's
Make AI
Work
Smarter
for You! ♥



Hi! I'm
Tamra!

I'll show you how to use
Projects in ChatGPT
and Claude on the web
to save hours every day! ♥

CHATGPT & CLAUDE PROJECTS

**CHEAT
BOOK** ♥

SET UP • ORGANIZE • ADD CONTEXT • SAVE TIME



ChatGPT

- Projects
- Instructions
- Memory
- Files / Sources
- Share



Claude

- Projects
- Project knowledge
- Instructions
- Memory
- Files
- Share

SAME IDEA
DIFFERENT
STRENGTHS

ORGANIZE
CONTEXT
GET BETTER
RESULTS! ♥

SMALL
SETUP
BIG
RESULTS!

1 CREATE A PROJECT

Set up a new project for your
goal, client, or workflow.

+ New Project

- Work | Operations
- Clients | Project A
- Research | AI Tools
- Personal | Planning

GIVE IT A
CLEAR NAME!

2 ADD INSTRUCTIONS

Tell ChatGPT or Claude how
you want it to respond.

Project instructions

Role: Act as a professional
operations assistant...
Response style: Clear, practical...
Output format: Use structured
sections...

SET
THE TONE!

3 ADD CONTEXT

Upload relevant files and
resources.

Project files

- Company-Info.pdf
- Workflow-Guide.md
- Client-Notes.docx
- Process-Checklist.xlsx

GIVE IT
THE RIGHT
INFORMATION!

4 ORGANIZE CHATS

Keep related conversations
in one project.

- Daily Priorities
- Meeting Prep
- Project Planning
- Client Updates
- Research Notes

KEEP
EVERYTHING
IN ONE PLACE!

5 USE MEMORY (WITH CONTROLS)

Choose the right memory
settings for your needs.

- Default memory
- Project-only memory

Settings vary by plan.
Check the latest documentation.

KEEP
CONTEXT
ON POINT!

6 SAVE TIME DO MORE

Less repetitive prompting.
More consistent results.

- Organize your work
- Keep important context
- Get better results
- Work faster
- Save hours every day!



POPULAR PROJECT IDEAS

- Personal | Morning Routine
- Work | Daily Operations
- Clients | Client Management
- Research | AI Tools
- Business | Strategy & Planning



PRO TIPS FROM TAMRA!

- Use clear project names
- Write focused instructions
- Add only relevant files
- Keep your projects organized
- Review and update regularly



THE RESULT?

- Better organized AI workspace
- More relevant and consistent answers
- Less time repeating information
- Faster workflows
- More time for what matters



LEARN THE FULL GUIDE

STEP-BY-STEP TUTORIAL
COMPARISONS
REAL EXAMPLES
& BEST PRACTICES



THE 10-MINUTE PROJECT SETUP

A practical browser-only starter checklist for ChatGPT and Claude.

01 CREATE & NAME

Create a project for a recurring goal or client.
Use names like Work | Daily Operations.
Keep unrelated subjects in separate projects.

02 ADD INSTRUCTIONS

Specify the role, task, style, and accuracy rules.
Keep instructions short and test them.
Store a master copy in a .md or .txt file.

03 ADD USEFUL CONTEXT

Attach only relevant, current reference files.
Check what your plan and interface support.
Do not upload secrets without reviewing controls.

04 ORGANIZE & REVIEW

Use focused chats for individual workstreams.
Review memory and sharing settings.
Revisit instructions as your workflow changes.

TAMRA'S COPY-READY TEMPLATE

Paste this into the project instructions field and customize it.

PROJECT INSTRUCTIONS — STARTER TEMPLATE

ROLE: Act as my [role or specialist].

PURPOSE: Help me with [specific recurring work].

CONTEXT: This project covers [scope, audience, and constraints].

STYLE: Be clear, practical, concise, and professional.

OUTPUT: Prefer [checklists, summaries, tables, or steps].

ACCURACY: Separate confirmed facts from assumptions.

QUESTIONS: Ask when missing details change the answer.

FILES: Use supplied references; flag outdated or conflicting material.

MAINTENANCE: I will review and update these instructions regularly.

TAMRA TIP: Test with 3 real tasks before adding more instructions!

SMART PROJECTS, SAFER WORKFLOWS

The controls are not identical across ChatGPT and Claude.

MEMORY IS NOT A FOLDER

Project organization and cross-chat memory differ.
Review each platform's current memory controls.
Do not assume all past chats are always available.

SHARING NEEDS A CHECK

Review collaborators and their permissions.
Check which files and chats can be visible.
Avoid sensitive uploads until policies are clear.

TIME SAVINGS: BE PRECISE

Projects can reduce repeated manual prompting.
They do not guarantee fewer tokens or hours saved.
Measure improvements in your own workflow.

OFFICIAL DOCUMENTATION

OpenAI: help.openai.com
Anthropic: support.claude.com
Check current plan and browser UI before use.