KAREN CAPPELLO, MCC | KARENCAPPELLO.COM

The Client Acquisition Department for Coaches

BONUS ONE · YOUR CONFIDENCE STARTS HERE

The Department
Installation Guide

Install your complete Client Acquisition Department in one focused sitting.

Fourteen specialists. One Chief of Staff.
Step-by-step instructions written for accomplished leaders, with no technical background required.

A WELCOME FROM KAREN

You've Led Bigger Installations Than This One.

In your corporate career, you launched initiatives, onboarded teams, and rolled out systems across entire organizations. Compared to that, what you're about to do is delightfully simple: about an hour, one web browser, and a series of small, clear steps.

So here's my question for you before we begin: what would it mean for your business to open your laptop on Monday and know that fourteen specialists and a Chief of Staff are ready for your briefing?

That's what this guide installs. Not software in the complicated sense, rather a way of working. The same structure, delegation, and strategic rhythm that made you exceptional as a leader, now aligned with your coaching business.

Follow each step in order. Check the box. Move to the next. And if you'd rather do this with company, your private 30-minute Installation Session with Kevin Thayer, Operations Support, walks through these exact steps together, one on one.

> A NOTE ON PACE
>
> There is no prize for speed. Some leaders finish in forty minutes; others savor it over a cup of tea. Both arrive at the same place: a working department that knows their business.

THE BIG PICTURE

What You're Installing

Your department is fifteen 'skills', small files of trained expertise that you upload to Claude, the AI platform your team runs on. Once uploaded, each one becomes a specialist you can brief in plain language.

Your Chief of Staff, the conductor. Every session starts here.

MARKETING DIVISION	Chief Marketing Officer · Messaging Strategist · Personal Brand Advisor · Content Director · Social Media Manager · Email Marketing Manager · Lead Magnet Advisor
RELATIONSHIP DIVISION	Relationship Manager · Referral Conversation Advisor · Follow Up Manager
ENROLLMENT DIVISION	Conversation Coach · Objection Advisor · Pricing Strategist · Proposal Writer

Before You Begin, Gather These Four Things:

1. **A computer with a web browser.** Chrome, Safari, or Edge all work beautifully. A laptop or desktop is best for setup; afterward, you can brief your team from your phone too.
2. **Your fifteen skill files**, the .zip files delivered in your welcome email. Download them to a folder you can find again (your Desktop is perfect). Leave them zipped: they upload exactly as they are.
3. **Your Master Business Profile worksheet**, included in your bonus materials. You will complete it in Step 6, and it is the single thing that makes your department feel like it knows you.
4. **About an hour of uninterrupted time**, and, if you like, that cup of tea.

1 Create Your Claude Account

Claude is the AI platform your department runs on. Think of it as the office building your team works in. Creating your account takes about two minutes.

1. Open your web browser and go to **claude.ai**
2. Click **Sign Up**.
3. Choose to continue with Google, Apple, or your email address. If you use email, Claude sends you a login code. Check your inbox, enter the code, and you're in.
4. Follow the short welcome prompts (your name, how you plan to use Claude).

> WHAT YOU'LL SEE
>
> A clean, mostly empty screen with a message box in the middle that says something like "How can I help you today?" That message box is where you'll eventually brief your team. Resist the urge to start chatting just yet. Your department isn't hired until Step 4.

> ALREADY HAVE A CLAUDE ACCOUNT?
>
> Wonderful. Simply sign in and move to Step 2 to confirm you're on the right plan.

2 Upgrade to the Claude Pro Plan

Your department requires the Pro plan (about $20 per month) because custom skills, your fourteen specialists and Chief of Staff, are a paid-plan capability. Consider it the most reasonable payroll you will ever run: an entire client acquisition team for less than a business lunch.

1. In Claude, click your initials or profile picture (lower-left corner on a computer).
2. Select **Settings**, then find the **Billing** or **Upgrade** option.
3. Choose the **Pro** plan and complete checkout with your card.
4. You'll see confirmation that Pro is active on your account.

> WHY THIS MATTERS
>
> Beyond skills, Pro gives you substantially more conversation capacity, important once your specialists are drafting proposals, emails, and content for you every week. One business expense, an entire operation.

3 Turn On the Capabilities Your Team Needs

One quick setting lets your specialists create polished documents for you. You only do this once.

1. Click your initials, then **Settings**.
2. Look for **Features** or **Capabilities** in the menu.
3. Make sure **Code execution and file creation** is switched on. (The name sounds technical; all it means is "my team may prepare documents for me.")

4 Upload Your Fifteen Skills

This is the hiring ceremony. Each file you upload adds one specialist to your department. The rhythm is simple, and you'll have it memorized by the third one.

1. Click your initials, then **Settings**.
2. Find the **Skills** section (under Settings or Customize, depending on your screen).
3. Click **Upload skill**.
4. Select your first .zip file. Start with Chief of Staff, the leader of the operation.
5. Wait a few seconds for the confirmation, then make sure its toggle is switched on.
6. Repeat for the remaining fourteen files, in any order you like.

> WHAT YOU'LL SEE
>
> A growing list of your specialists by name, Chief of Staff, Chief Marketing Officer, Messaging Strategist, and so on, each with a small on/off toggle beside it. When all fifteen are listed with toggles on, your department is fully staffed. Take a moment. You just built a team.

> IF AN UPLOAD DOESN'T TAKE
>
> Confirm the file is still zipped (don't unzip it), that you're on the Pro plan (Step 2), and that code execution is on (Step 3). Then try once more. Still stuck? Bring it to your private Installation Session with Kevin. This is precisely what it's for.

5 Create Your Department Headquarters

If Claude is the office building, a Project is your department's floor. Everything you keep there, your team can see. Everything outside it, they cannot.

This is the step that ends the retyping.

1. In the left menu, click **Projects**.
2. Click **New Project**.
3. Name it **My Client Acquisition Department**.
4. Click **Create**.

> WHAT YOU'LL SEE
>
> A clean project screen with a message box, and an area for project knowledge along the side. That knowledge area is where your business details will live, permanently, starting in Step 7.

> WHY THIS MATTERS MORE THAN IT LOOKS
>
> A brand new chat opens with no memory of you. A chat inside your Project opens already knowing your ideal client, your offer, your pricing, and your voice. Same specialists, entirely different starting point.

> A SMALL HABIT WORTH FORMING
>
> From today forward, start your work inside this Project rather than a blank chat. It takes one extra click and it changes the quality of everything that comes back.

6 Hold Your First Briefing

Time to meet your Chief of Staff. Open a new chat **inside your Project** and type this, word for word if you like:

> "Use my Chief of Staff skill. I'm ready for my First Win session. Ask me what you need to know about my coaching business, then tell me the most important thing to move forward today."

Your Chief of Staff will ask about your ideal client, your offer, and where your business stands. Answer conversationally, exactly as you would in a real briefing. No special language required. Then it will recommend your first move and route you to the right specialist.

Have your **Master Business Profile worksheet** beside you while you answer. Your Chief of Staff is asking the same questions the worksheet asks, so you can fill it in as you go, or complete it first and paste your answers in. Either way, you finish this step holding one document that describes your business completely.

HOW TO SPEAK TO YOUR TEAM

Brief, don't prompt. Give context the way you would to a trusted employee: "A prospect from Tuesday's call went quiet, draft a warm follow-up" outperforms any clever wording. You already know how to do this. You did it for years.

NOT SURE WHICH SPECIALIST TO ACTIVATE FIRST?

Your First Win Playbook (Bonus 3) matches your current situation, whether a quiet pipeline, stalled conversations, or an unclear message, to your fastest meaningful result.

7 Give Your Department Its Memory

You now have a Master Business Profile. This step is what turns it into something your entire department carries with it.

1. Save your completed profile as a document on your computer.
2. Open your **My Client Acquisition Department** project.
3. Find the **project knowledge** area and click **Add** or **Upload**.
4. Add your profile.

That is the whole step. It takes ninety seconds and you will never do it again.

WHAT CHANGES IMMEDIATELY

Before, every briefing carried a paragraph of background. After, your briefings sound like this:

> *"Use my Proposal Writer skill. Write a proposal for Acme for a six month engagement with their VP of Operations at eighteen thousand dollars."*

Your specialists already know who you serve, what you charge, and how you sound.

ONE THING TO REMEMBER

Creating the Project is not what creates the memory. Adding your profile to project knowledge is. A Project with an empty knowledge area behaves exactly like a blank chat.

Once a month, two minutes. Open your profile and update your current focus: your ninety day result, your bottleneck, and your numbers. The rest holds steady for a quarter or more.

MAKE IT A PRACTICE

Your Monday Morning Department Meeting

Installation gives you a team. Rhythm gives you results. Each Monday, open a fresh chat inside your Project and hold a thirty-minute department meeting.

Minutes 1–5	Report in: what happened last week, including conversations held, content shared, and replies received.
Minutes 5–15	Your Chief of Staff sets this week's single priority and names the specialists involved.
Minutes 15–30	Brief those specialists and review their first drafts.

That's it. No blank page, no wondering what a real coaching business does on a Tuesday. Your full agenda and scripts are in Bonus 5, The Monday Morning Department Meeting.

Answers to the Questions Leaders Ask Most

"Will it remember me?" Inside your Project, yes. Your profile sits in project knowledge and every specialist reads it before they begin. Outside your Project, every chat starts fresh, which is precisely why Step 5 and Step 7 matter as much as they do.

"Will it sound like me?" Increasingly, yes. Your specialists learn your voice from your profile, your briefings, and your edits. The first draft is a strong start; by the fifth, colleagues won't believe you had help.

"What if I say the wrong thing to it?" You can't. There is no wrong way to brief your team. If a draft misses, say so plainly, as in "warmer, shorter, less formal", and a revision appears in seconds.

"Do I have to use all fourteen right away?" Please don't. Exceptional leaders sequence. One specialist, one win, then the next. Your Chief of Staff will pace you.

YOUR DEPARTMENT IS OPEN FOR BUSINESS

You're Leading Again.

Somewhere in the last hour, something shifted. You stopped being a department of one. Fourteen specialists and a Chief of Staff now report to you, trained in frameworks refined over two decades of helping former corporate leaders build coaching businesses they love. And they know your business by name.

So, one last coaching question: what will you delegate first?

YOUR NEXT FOUR MOVES

1. Hold your First Win session with your Chief of Staff (Step 6).
2. Add your Master Business Profile to project knowledge (Step 7).
3. Open your First Win Playbook and activate your first specialist.
4. Put your Monday Morning Department Meeting on the calendar, a recurring thirty minutes, starting this week.

Questions along the way? Bring them to your private Installation Session with Kevin Thayer, Operations Support, or reach us any time through karencappello.com.

Love and great joy,