

CHARISMA DIGITAL · LEAD MAGNET

From ChatGPT to Claude.

The NZ SMB Marketer's Switching Guide

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A note before you start.

This guide is for NZ small business owners and marketers who have used ChatGPT, got some value from it, and heard that Claude is worth a look.

It does not assume you are technical. It just requires that you have spent some time using AI for business work and want to know whether switching tools makes sense for you.

The guide is built around one idea: **the quality of what you load into Claude matters far more than the quality of your prompts.** The businesses getting the most from this tool are not the ones who have mastered prompt engineering. They are the ones who have taken the time to describe their business clearly.

How to use this guide. Start with the assessment in Chapter 2. It takes about five minutes and points you to one of two paths. *Path A – Transfer.* You have something worth bringing across. *Path B – Start fresh.* Your ChatGPT history will not give Claude much to work with. Either path leads to Chapter 5, where the real setup work begins.

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Why switch from ChatGPT to Claude.

You have used ChatGPT. You have got the output, done the editing, and sent the thing. But somewhere in that process – probably the editing part – you wondered if there was a better way.

There is. And a lot of NZ businesses are finding it.

Should you switch? Tick what applies.

- You spend time rewriting AI output before it sounds like your business.
- You work regularly with long documents – proposals, brand guidelines, reports.
- You want finished deliverables, not raw text to copy and paste.
- You handle sensitive client or business data in your AI sessions.
- Writing and content is your main AI use, not images or voice.
- You want an AI that pushes back when something is off.

TICKED FOUR OR MORE?

Read on. The next page covers what Claude does better, where ChatGPT still wins, and whether the switch is worth it for your business.

Where ChatGPT still wins.

Claude is not the right tool for everything. Stick with ChatGPT if your team needs real-time web browsing, AI image generation, or voice features. If you have built Custom GPTs that are already working well, keep them.

The businesses switching to Claude are doing it for one reason. They do a lot of writing, they care how it sounds, and they want output that is closer to finished before they touch it.

TIP — VOICE PROMPTING

If voice prompting matters, look at **Wispr Flow** (wisprflow.ai). Works directly with Claude. Closes the voice gap without needing to stay on ChatGPT for that reason alone.

FEATURE	CLAUDE	CHATGPT
Brand voice matching	Holds across long sessions	Drifts in long sessions
Context window	200,000 tokens	Up to 128,000 tokens
Output format	Artifacts — edit + export	Text in chat window
Image generation	Not available	Via DALL-E
Real-time web search	Limited	Built in
Saved instructions	Claude Projects	Custom GPTs

Transfer or start fresh?

Before you touch a single setting in Claude, answer these eight questions. Score each answer (1–3 points) and add up your total.

1. How organised is your ChatGPT history? (*Named & grouped 3 · Some named 2 · No idea 1*)
2. Do you have a Custom GPT? (*Detailed 3 · Basic 2 · No 1*)
3. How often do you reuse previous chats? (*Regularly 3 · Occasionally 2 · Rarely 1*)
4. Is your brand voice documented outside ChatGPT? (*Yes 3 · Partly 2 · No 1*)
5. How much of your ChatGPT memory do you trust? (*Most 3 · Some 2 · Never checked 1*)
6. Have you built repeatable prompt sequences? (*Yes 3 · A few 2 · No 1*)
7. How long have you used ChatGPT consistently? (*12+ mo 3 · 6–12 mo 2 · <6 mo 1*)
8. How specific is the context ChatGPT has on your business? (*Very 3 · Somewhat 2 · Generic 1*)

BEFORE YOU SCORE YOURSELF

Go to **Settings > Personalization > Manage Memory** in ChatGPT and read what it has stored. Most people are surprised by how little is there, or how outdated. That check makes your score more accurate.

Add up your score. Two paths, one start.

20–24 PTS

Transfer (Path A). You have built something worth carrying across. Chapter 3 walks you through the full transfer process step by step.

13–19 PTS

Transfer selectively. Some of what you have is worth keeping. Follow Path A, but use the filter in Chapter 3 to decide what to bring and what to leave behind.

8–12 PTS

Start fresh (Path B). Your ChatGPT history will not give Claude much to work with. Starting clean lets you build the right foundation from the beginning.

Either path leads to Chapter 5. That is where you build the five documents that make every Claude session faster and more on-brand. The path you take is just how you arrive.

B

Start fresh. Do it right.

If your assessment sent you here, this is good news. Starting fresh means you are not carrying across anything that does not serve you. No outdated memories. No habits built around a different tool.

The full Path B guide is a separate resource. It covers:

- How to write your five core documents from scratch.
- The exact questions to answer before you write a single word.
- How to capture your brand voice if you have never documented it.
- A session-by-session setup plan for your first two weeks in Claude.

STARTING FRESH ≠ STARTING BEHIND

The businesses that get the most from Claude are often the ones who built deliberately from day one, rather than importing habits from another tool.

Download the Path B guide at charismadigital.co.nz/claude-start-fresh

The five documents to build in every Claude Project.

Here is the single biggest mistake people make with Claude. They open a new session, type a request, and wonder why the output does not sound like their business. This happens because Claude does not know you yet. Every new session starts from zero unless you build the layer that changes that.

These five documents are that layer. Load them into a Claude Project once, and every session that follows starts with Claude already knowing who you are, how you work, and what good looks like.

For each document, the next pages give you the description, why it matters, and a ready-to-use prompt. Copy each prompt, run it in Claude, and build the file through the conversation that follows.

ONE FILE BEATS FIVE

Keep all five documents under 6,000 tokens total. A short file Claude reads completely beats a long file that gets skimmed.

01 about-me.md

Your identity file. It tells Claude who you are, how you work, and what you expect from every interaction. Include your name and role, your communication style, your standards, the things that matter most, and the things that will make you ask for a rewrite every time.

Write it as direct statements, not requests. Be absolute where it matters. Keep it under 2,000 tokens.

PROMPT TO BUILD ABOUT-ME.MD

I want to build my about-me.md file so that Claude knows exactly who I am and how I work before starting any task.

Format it as a Markdown file under 2,000 tokens with:

- A short paragraph about who I am and what I do
- My communication preferences and working style
- My non-negotiables for any piece of work
- Three to five standing rules Claude must always follow

First, read my answers to your questions before writing. Do NOT start drafting yet. Ask me five questions about my working style, my standards, and what frustrates me most in AI output. Then build the file with me, one section at a time.

02 brand-voice.md

Your anti-generic file. It contains your writing rules, your tone, your banned words and patterns, and examples of your best existing content. Paste in two or three real pieces – an email, a social post, a paragraph from a proposal – that show your voice at its best.

THIS FILE DOES THE MOST WORK

A well-built brand-voice.md means you stop editing AI output for tone and start editing it for substance. That is where the real time saving is.

PROMPT TO BUILD BRAND-VOICE.MD

I want to build my brand-voice.md file so that every piece of content Claude writes sounds like me, not like a generic AI.

Format it as a Markdown file with:

- A tone description in plain language
- A list of banned words and patterns
- My sentence length and structure preferences
- Three examples of my best writing with notes on why each one works

First, read the content samples I am about to paste. Do NOT start drafting yet. Ask me what I think my voice sounds like, then show me what you actually observe in the samples. Build the file with me, one section at a time, and confirm each section before moving on.

03 my-business.md

Your business context file. It covers what you do, who you serve, what you are working on right now, and what you are not doing. Include your core offers, target audience, current priorities, and what you are saying no to this quarter.

Update this file quarterly. An outdated business context file will send Claude in the wrong direction as reliably as an empty one.

PROMPT TO BUILD MY-BUSINESS.MD

I want to build my my-business.md file so that Claude always has accurate, current context about what my business does and what I am focused on right now.

Format it as a Markdown file under 1,500 tokens with:

- A clear description of my core offers
- My primary audience and what they hire me to solve
- My current priorities for this quarter
- What I am not taking on right now
- The one thing I most want clients to understand about working with me

First, read everything I share before writing anything.

Do NOT start drafting yet. Ask me five questions about my business, my positioning, and my current focus.

Then build each section with me and confirm it before moving to the next.

04 audience-intel.md

This is the file most people skip, and it shows in their output. Your audience file captures how your clients actually talk — the words they use in conversations, in reviews, in emails to you. Build it from real sources: client emails, discovery call notes, testimonials, social comments.

WHERE TO FIND THE RAW MATERIAL

Check your email inbox for client replies. Pull your Google or Facebook reviews. Even five or six direct quotes from real clients will give Claude more to work with than a paragraph you wrote about your audience yourself.

PROMPT TO BUILD AUDIENCE-INTEL.MD

I want to build my audience-intel.md file so that Claude writes content that sounds like it came from inside my clients' world, not from outside looking in.

Format it as a Markdown file with:

- How my audience describes their main problem in their own words
- The phrases and language they repeat
- Their most common objections
- What they say when they feel understood
- What they are worried about but rarely say directly

First, read the client language I am about to paste — reviews, emails, sales call notes, social comments.

Do NOT start drafting yet. Build the file using only language sourced from real client conversations, not interpretations.

05 CLAUDE.md

Your operating instructions file. It tells Claude exactly how to behave in every session. Keep it under 60 lines. Beyond a certain length, compliance drops. Short and specific beats long and thorough.

Include how to handle unclear briefs, whether to ask questions or make assumptions, how to flag when something is outside scope, and any session-level rules that apply across all your work.

PROMPT TO BUILD CLAUDE.MD

```
I want to build my CLAUDE.md operating instructions
file so that Claude behaves consistently in every
session without me having to repeat myself.
```

```
Format it as a Markdown file under 60 lines with:
```

- How to handle unclear briefs
- Whether to ask questions or make reasonable assumptions
- How to flag when a task is outside scope
- My preferred output format for different task types
- Three to five rules that apply to every session

```
First, read my about-me.md and brand-voice.md before
you write anything. Do NOT start drafting yet. Ask me
about the situations where AI output has frustrated me
most. Then build the file with me, testing each rule
against a real task before we lock it in.
```

How not to burn through your credits.

Every message you send causes Claude to re-read the entire conversation. Message thirty means twenty-nine previous exchanges processed before reading your new request. These eight habits change that.

- 1. Convert files before uploading.** A PDF page costs 1,500–3,000 tokens. Paste as plain text or Markdown instead.
- 2. Plan in Chat. Build in Cowork.** File creation uses more limit than conversation. Think first, build second.
- 3. Restart instead of follow up.** Use "Restart the conversation from here" to cut the re-reading cost.
- 4. Batch your tasks.** Three prompts = three reloads. One prompt with three tasks = one reload.
- 5. Choose the right model.** Sonnet for routine work. Save Opus for complex strategy.
- 6. Keep core files lean.** All five documents under 6,000 tokens total.
- 7. Use plain text wherever possible.** Markdown costs less than PDF. Plain text costs less than formatted.
- 8. Close old Projects when done.** Active Projects load context even when not in use.

THE 20-MESSAGE RULE

When a session reaches around 20 messages, ask Claude to summarise. Copy it. Start a new session. Paste it in. You carry forward everything that matters and reset the cost.

Slash commands & productivity hacks.

Type these directly into any Claude session. They change how Claude processes and formats its response.

COMMAND	WHAT IT DOES	USE WHEN
<code>/ghost</code>	Removes robotic, AI-sounding language	Captions, emails, social
<code>/mirror</code>	Matches your exact writing style	Consistent brand voice
<code>/deepthink</code>	Step-by-step reasoning	Strategy, pricing, complex calls
<code>/blindspot</code>	Finds gaps, risks, weak points	Reviewing offers and ideas
<code>/OODA</code>	Observe-Orient-Decide-Act framework	Decisions, competitive analysis
<code>/BRIEFLY</code>	Forces a short, direct answer	Summaries, not essays
<code>/HOOKS-NOW</code>	Generates opening lines	Strong first sentence fast
<code>L99</code>	Forces a decisive answer — no hedging	You want a clear recommendation

FULL COMMAND LIST

There are 30+ commands available. Download the full reference at charismadigital.co.nz/claude-commands.

SKILLS COME LATER

Skills are **Chapter 2** of your Claude journey. Get the five documents working first. A skill on a weak foundation produces weak output at speed.

Marketing prompts. Brand & content.

Run these inside a Claude Project that already has your five core documents loaded. Without that context, Claude is writing for a generic business. With it, Claude is writing for yours.

01 · BRAND VOICE EXTRACTION

Here are three examples of my best existing content:

[PASTE CONTENT EXAMPLE 1]

[PASTE CONTENT EXAMPLE 2]

[PASTE CONTENT EXAMPLE 3]

Analyse the writing style across these three pieces. Identify sentence length patterns, tone, vocabulary I favour, and phrases I return to. Write a brand voice summary I can add to my brand-voice.md file.

04 · INSTAGRAM CAPTION

Write an Instagram caption for [TOPIC/PRODUCT/SERVICE].

My audience is [AUDIENCE DESCRIPTION].

The goal of this post is [GOAL].

Keep it under 150 words.

/ghost

06 · EMAIL SUBJECT LINE VARIANTS

I am sending an email to [AUDIENCE] about [TOPIC].

Goal of the email is [GOAL].

Write 8 subject line options. Mix curiosity, direct benefit, specific number, question, and urgency. Flag which two you would test first and why.

Marketing prompts. Strategy & sales.

12 · CLIENT PROPOSAL ONE-PAGER

I am writing a proposal for [CLIENT NAME/TYPE].
Their problem is [PROBLEM DESCRIPTION].
My proposed solution is [SOLUTION DESCRIPTION].
The investment is [PRICE OR RANGE].

Open with their problem in their language. Explain the solution in plain terms. List three specific outcomes they can expect. Close with a clear next step. No jargon.

15 · OFFER REVIEW

Here is my current offer:
[DESCRIBE YOUR OFFER IN DETAIL]

/blindspot

Look for gaps, risks, objections I have not answered, and anything a potential client might think but not say. Be direct. Do not soften the feedback.

18 · CLEAR RECOMMENDATION

I need to decide between [OPTION A] and [OPTION B].
Here is the context: [RELEVANT CONTEXT].

L99

Give me a direct recommendation. Tell me which option and why. Do not give me a balanced answer that leaves the decision to me.

CONTEXT BEATS PROMPTS

These prompts work best inside a Claude Project with your five core documents already loaded. The documents in Chapter 5 are what make these prompts produce output worth using.

The part the guide cannot give you.

Building these five documents on your own is entirely possible. But the hardest part of capturing your brand voice is not knowing what to write — it is knowing what questions to ask yourself. Those questions require a real conversation. Not a template.

We start with onboarding. One focused session where we build your five documents properly. A human strategist asking the right questions. You answering from real experience. After that, every piece of content we produce is reviewed by a named human reviewer before it goes out under your name. **Every single one.**

8.7/10 **Average client satisfaction.** 8.3/10 for brand voice accuracy. Every client described it the same way: *set and forget.*

From NZ\$1,500 per month. Compare to a part-time marketing hire at \$85,000/year. 12 to 20 hours back in your month. Content that sounds like you. A human who reads it before your audience does.

A 30-MINUTE CLARITY CALL

No pitch. Just a conversation between two people who take marketing seriously. We talk about your business, your voice, and whether the Wisdom Layer is the right fit.

LET'S TALK

Let's get started.

Book a clarity call. Real strategy. No fluff.

LET'S TALK

STRATEGY-LED

RESULTS-FOCUSED

PEOPLE-FIRST

CLARITY IN EVERY STEP

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