



# CLAUDE CODE: THE SOLO CONSULTANT'S OPERATING SYSTEM

Managing clients, leads, and projects from the terminal.



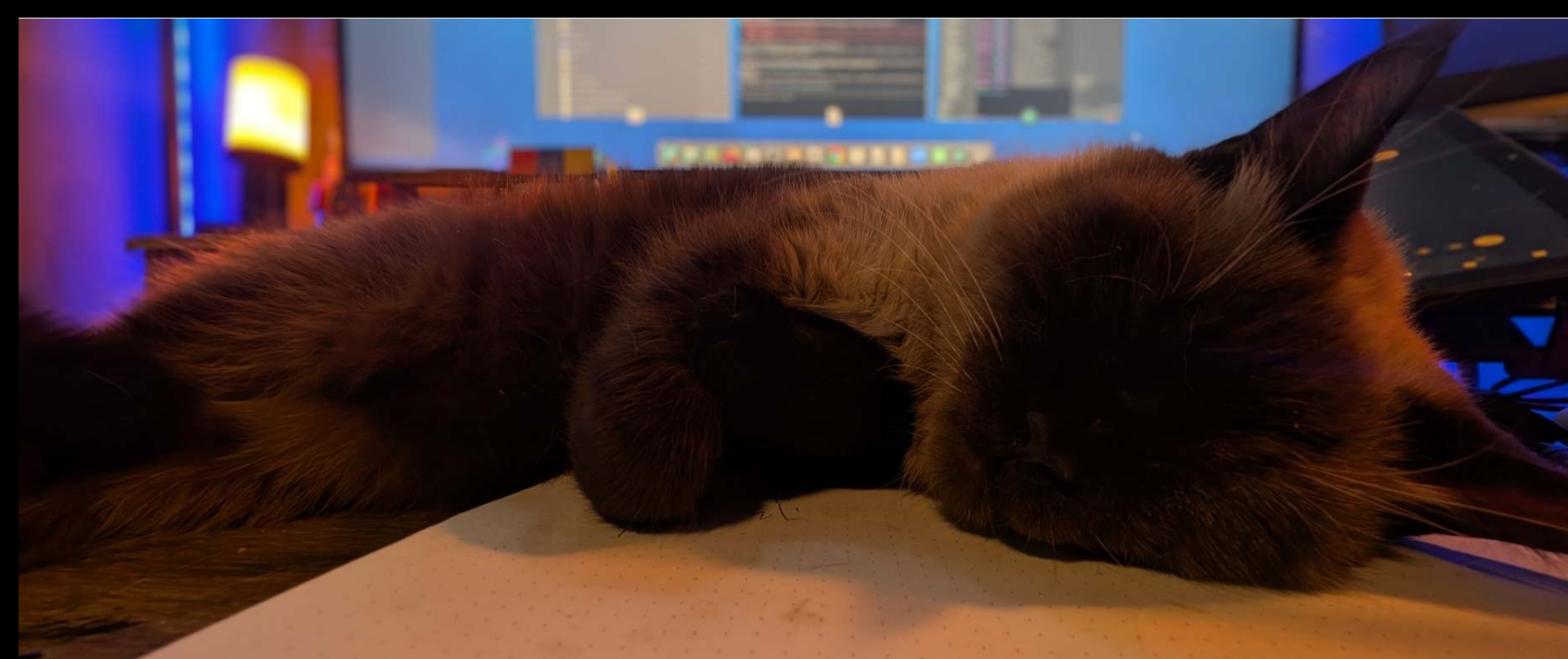
The Challenge

# THE SOLO CONSULTANT'S DILEMMA

**Multiple clients. Multiple tools. One person.**

**The goal:**

- ✓ **Increased bandwidth = more clients.**
- ✓ **Automate the operational overhead while keeping human judgment in the loop.**
- ✓ **Increase budget for pup cups = happy dogs.**



**PETS MAKE  
LOUSY  
INTERNS**

# WHAT IS CLAUDE CODE?



## AI developer on demand.

Executes real engineering tasks autonomously: writes code, runs tests, fixes bugs, and commits changes without hand-holding

```
• Bash(git -C /home/andrew/workspace/84em-blogs checkout main 66 git -C
/home/andrew/workspace/84em-blogs pull 88 git -C
/home/andrew/workspace/84em-blogs branch -D fi_)
└─ Switched to branch 'main'
Your branch is behind 'origin/main' by 2 commits, and can be fast-forwarded
.
... +6 lines (ctrl+o to expand)

• Now the remote branches.

• Bash(git -C /home/andrew/workspace/84em-blogs push origin --delete
feat/taxonomy-restructure feat/ui-simplify fix/force-legacy-redirects
fix/force-redirects fix/lega_)
└─ To github.com:84emllc/84em-blogs.git
- [deleted]      claude/describe-84em-header-NDN5o
- [deleted]      feat/taxonomy-restructure
... +19 lines (ctrl+o to expand)

• All cleaned up. 21 stale branches deleted (local and remote). Only main remains.
...
>

workspace/Clients/84EM-Blogs · main · Opus 4.6
▶▶ accept edits on (shift+tab to cycle)
```

# WHAT IS CLAUDE CODE?

## ✓ Works inside your existing codebase.

No migration, no new platform; it operates directly in your team's terminal and version control workflow



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# WHAT IS CLAUDE CODE?



## Extensible by design.

Connects to external tools and services (databases, project management, APIs) via a growing ecosystem of integrations

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# WHAT IS CLAUDE CODE?



## Guardrails built in.

Requires explicit approval for destructive or sensitive actions, with configurable permission tiers for team environments

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## ✓ Force multiplier for small teams.

Reduce the time between idea and working software. What took days, now takes hours.



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**TRY AS THEY  
MIGHT, THEIR  
PHONE  
SKILLS ARE A  
LITTLE RUFF.**



# IT ALL STARTED WITH DOG DAY CARE.

Happy Birthday from your ACCR family— we hope your day was paws-itively perfect! 🥳🐾

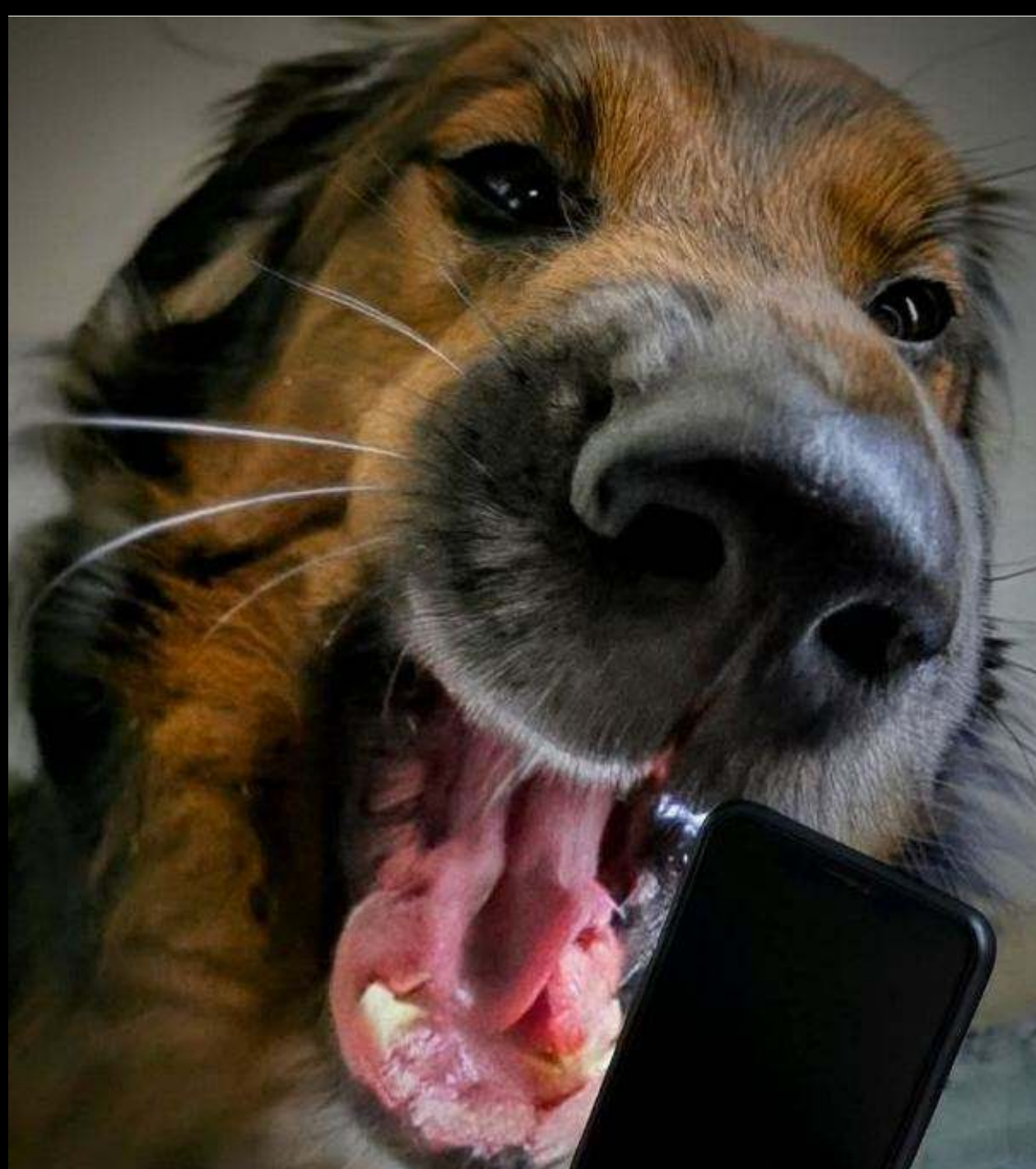




**CRUISING WITH THE DOGS, THINKING ABOUT WORK.**

*(and bad AI images)*

**USING  
ANDROID AUTO  
FOR VOICE  
TO TEXT**



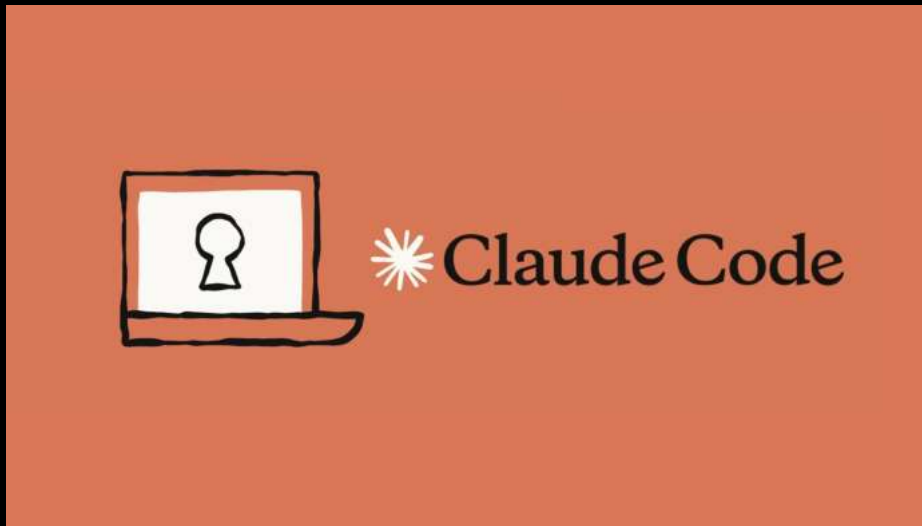


**"HEY GOOGLE,  
ADD AN EVENT  
TO MY CALENDAR  
FOR 11AM TODAY"**

*"WHAT IS THE TITLE OF THE EVENT?"*

**"BUY CAT NIP"**

# "WHAT'S ON MY CALENDAR FOR TODAY?"





# NOW FOR SOME EXCITING STUFF.

A simple checklist is cool, but can we do better?

- ✓ Every Monday, create **weekly action items** for each **client**?



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- ✓ Every Friday, generate end of week summary for the client?



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- ✓ Every Monday, create weekly action items for each client?
- ✓ Every Friday, generate end of week summary for the client?
- ✓ **Project roadmaps?**
  - ✓ Phases & tasks?
  - ✓ With check boxes?
  - ✓ AI agents can track across many sessions?
  - ✓ Humans can easily track as well?



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- ✓ **Maybe we can track when proposals are signed?**

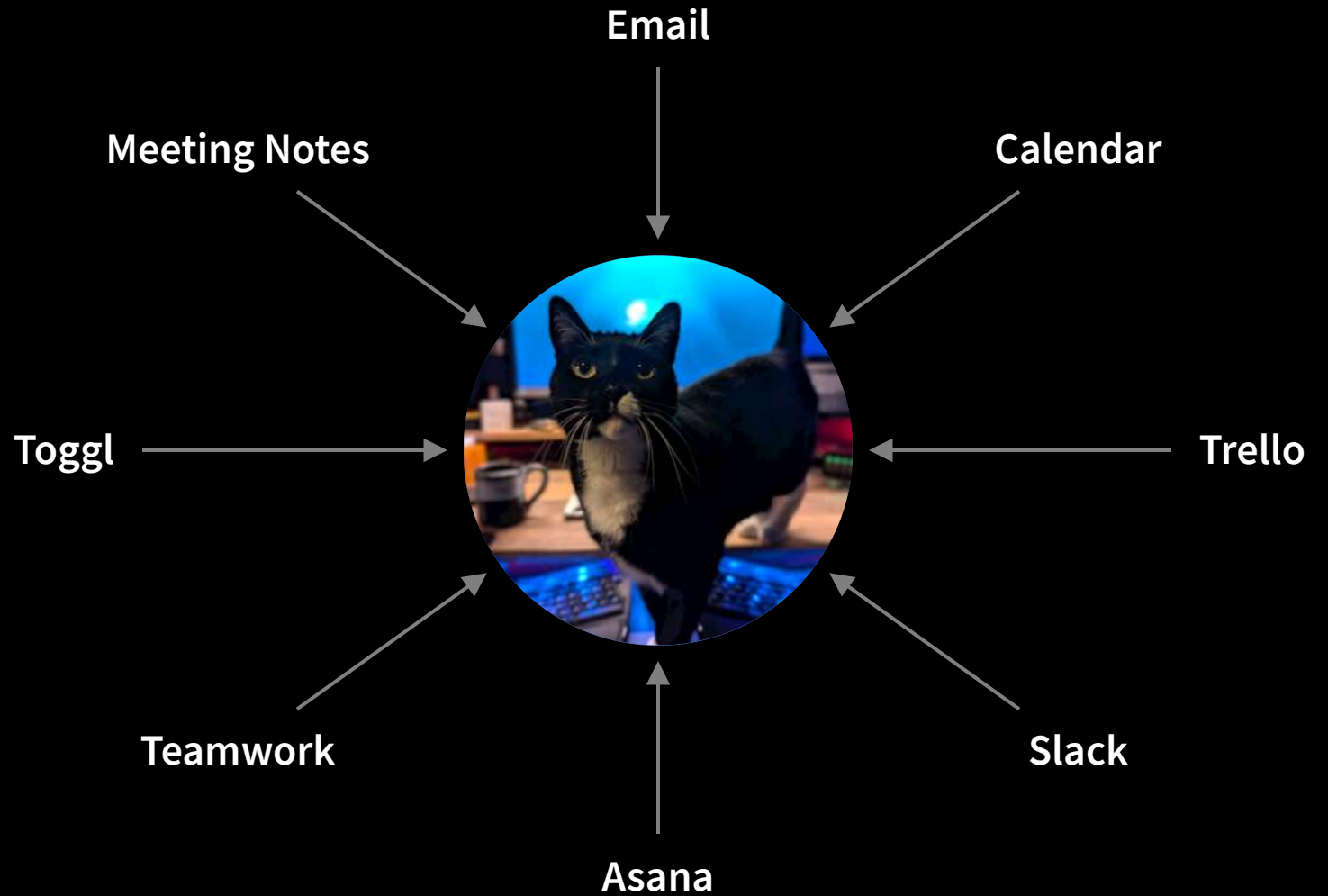


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  - ✓ AI agents can track across many sessions?
  - ✓ Humans can easily track as well?
- ✓ Maybe we can track when proposals are signed
- ✓ **And invoices, too? Great way to track project kick-off.**

# SYSTEM OVERVIEW



Everything routes through Claude Code. Except Lenny.

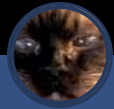
# THE LEADS KNOWLEDGE BASE

System that tracks prospects from first contact through qualification.



## Lead

Comes in through the website,  
email, LinkedIn, referral  
or carrier pigeon



## Qualify + Track

AI-assisted lead assessment.  
Company history? Industry?  
Are they a good fit?



## Result

Won? Awesome!  
Lost? Better luck next time.

# THE CLIENT KNOWLEDGE BASE

Using Markdown formatted text files, easily readable for AI Agents & Humans.



**Automated syncing of emails and calendars**

Keeps client information up-to-date automatically.



**Dashboard for at a glance summaries**

Provides a quick overview of key client information.



**Consistent structure for every client**

Ensures uniformity and ease of use across all client data.



**New client setup in minutes**

Streamlines the onboarding process for new clients.



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# DAY-TO-DAY WORKFLOWS

## Voice to Task

- ✓ Dictate tasks via calendar for automated routing.

## Unified Project Tracking

- ✓ Consolidate tasks from various PM tools into one view.

## Proposals

- ✓ AI-assisted drafting from templates.

## Weekly Planning

- ✓ Automated agenda generation from calendar and tasks.

## Meeting Notes

- ✓ Import meeting notes and transcripts.

```
On branch main
nothing to commit, working tree clean

All committed. Four commits:

1. [redacted] - Trello card sync + 19 emails (ex-div, upload template, [redacted] sync/support, requests)
2. [redacted] - Trello card sync + personalization spec + 3 emails (personalized homepage logic)
3. [redacted] - new project directory + Trello export
4. [redacted] - AGENTS.md ([redacted]s), weekly action items, config files, super admin email

Baked for 1m 6s

git status?

Bash(git -C /home/andrew/workspace/Clients/[redacted] status)
On branch main
nothing to commit, working tree clean

clean.
```

```
workspace/Clients/[redacted] · main · Opus 4.6
>> accept edits on (shift+tab to cycle)

Tagged v1.19.2
PR targets staging

Sautéed for 1m 2s

merged. fetch staging. then delete all local (not remote) branches that are NOT staging.

Bash(git -C /home/andrew/workspace/[redacted]/app/public/wp-content checkout staging 66 git -C /home/andrew/workspace/[redacted]/app/public/wp-content pu...)
Switched to branch 'staging'
Your branch is up to date with 'github/staging'.
From github.com:P[redacted]
... +11 lines (ctrl+o to expand)

Bash(git -C /home/andrew/workspace/[redacted]/app/public/wp-content branch | grep -v '^.* staging$' | grep -v '^.*staging$' | xargs -r git -C /home/andrew/work...)
Deleted branch release/v1.17.2 (was afc24c16).
Deleted branch release/v1.17.3 (was c2644a01).
Deleted branch release/v1.17.4 (was 7da4860c).
... +4 lines (ctrl+o to expand)

Staging is current. Deleted 7 local release branches. Only staging remains.
```

```
andrew@pop-os-new: ~/workspace/Clients/OUTSIDR 174x34

-A, BILLING] (https://trello.com/c/hPfqD37v)
39 -Generated 2026-03-09T08:00:18Z from Trello board state. Enrich with
- 'claude' for context notes.*
45 + [ ] *FUTURE: Configure monetization (subscriptions, store, ads)*
+ [BILLING] (https://trello.com/c/[redacted])
46 + [ ] *FUTURE: Subscription flow testing (signup, payment, access)*
+ [QA, BILLING] (https://trello.com/c/[redacted])
47
48 ## This Week's Focus
49 +
50 1. **Photo import** (due Wed) -- build the photo pipeline so synced
- listings get featured images
51 2. **Theme Phase 3** (due Fri) -- search and maps integration
52 3. **Cookies/consent** (due Fri) -- scope and implement

Weekly action items enriched. Three priorities this week:
1. Photo import (due Wed 3/11)
2. Theme Phase 3 - search and maps (due Fri 3/13)
3. Cookies/consent setup (due Fri 3/13)

Crunched for 32s

[exit]
Catch you later!
```

```
* Claude Code 171x26

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" log --oneline -5)
6de3a28 feat: add Proposals directory section to AGENTS.md
203a5fe chore(hyh): sync gmail, export trello boards, update weekly action items
16e2899 docs(hyh): add network security analysis for Cloudflare WAF and origin lockdown
... +2 lines (ctrl+o to expand)

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" add -A)
warning: CRLF will be replaced by LF in Emails/2026-02-25-131042-re-meeting-9.eml.
The file will have its original line endings in your working directory
warning: CRLF will be replaced by LF in Emails/2026-02-26-120000-ticket440630ea-7520heal[redacted]migration-email-re.eml.
... +20 lines (ctrl+o to expand)

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" commit -m "$(cat <<'EOF'
chore: sync KB -- emails, trello exports, project docs, screenshots, weekly s...)
[main f6873fa] chore: sync KB -- emails, trello exports, project docs, screenshots, weekly summaries
114 files changed, 40496 insertions(+), 579 deletions(-)
create mode 100644 .claude.json
... +30 lines (ctrl+o to expand)

Done. Committed f6873fa -- 114 files changed across emails, Trello exports, project docs, screenshots, weekly summaries, and AGENTS.md updates.
```

```
* Claude Code 171x27

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" diff)
diff --git a/AGENTS.md b/AGENTS.md
index 78e531e..6fddda7 100644
--- a/AGENTS.md
... +36 lines (ctrl+o to expand)

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" add AGENTS.md "Emails/" "Meetings/2026-03-09/" "Projects/weekly-action-items.md" "Projects/[redacted]rc...")
warning: CRLF will be replaced by LF in Emails/2025-11-18-103226-wordpress-website-development-[redacted].eml.
The file will have its original line endings in your working directory
warning: CRLF will be replaced by LF in Emails/2025-11-18-150107-a[redacted]rd-project.eml.
... +37 lines (ctrl+o to expand)

Bash(git -C "/home/andrew/workspace/Clients/[redacted]" commit -m "$(cat <<'EOF'
docs: initial KB sync, Trello board setup, [redacted] meeting notes, [redacted]s proposa...)
[main 98296fd] docs: initial KB sync, Trello board setup, [redacted] meeting notes, [redacted]s proposal
60 files changed, 521490 insertions(+), 11 deletions(-)
create mode 100644 Emails/2025-11-18-103226-wordpress-website-development-[redacted].eml
... +25 lines (ctrl+o to expand)

Committed: 98296fd.
```

```
* Claude Code 171x24

56 + **Invoice 10049 payment confirmed** (#4: https://trello.com/c/r[redacted] -- $[redacted] 2026-03-04
57 + **[redacted] S50 Feb 20 test outcome** (#10: https://trello.com/[redacted]) -- [redacted] [redacted]s.com user, outcome not confirmed (overdue sin
ce 2026-02-25, 12 days)
58 +
59 ----
60 +
61 ## Workstream Summary
62 +
63 +**[redacted]** -- Active discovery. Technical audit done; CAS protocol confirmed, no OAuth/OIDC/SAML. [redacted] ar
+ redirect but requires OneHQ cooperation. Report drafted, delivery and [redacted] introduction are the immediate next steps. Due 2026-03-11 (2 days).
64 +
65 +**[redacted]** -- Proposal sent, awaiting signature. Separate site, separate discovery. Depends on [redacted] reply revi
+ew.
66 +
67 +**[redacted]** -- Complete. Post-launch issues resolved. One stale follow-up card (#10) in Done about confirming Feb 20 test results.
68 +
69 +Generated 2026-03-09. Enriched with card descriptions, checklist state, email context, and calendar data.*

Enriched. Key highlights:
- #12 [redacted] Discovery is due Wednesday (2026-03-11). Phases 1-3 done, report drafted but undelivered. Blocked on [redacted] technical introduction -- [redacted] 2026-03-05
email asks when to connect. Reply to [redacted] is the top priority.
- #11 [redacted] Solutions proposal sent 2026-03-04, [redacted] replied same day but that reply hasn't been reviewed yet.
- #10 [redacted] n test confirmation is 12 days overdue in Done -- stale follow-up.
- No [redacted] meetings on the calendar this week.

* Worked for 1m 24s

workspace/Clients/[redacted] · main · Opus 4.6
>> accept edits on (shift+tab to cycle)
```



# "PUP CUPS FOR THREE, PLEASE."

GILDA JUDY MILLER

# SETTING UP IN 3...

```
Scaffolding client knowledgebase: TakeCarePets
Directory: /home/andrew/workspace/Clients/TakeCarePets

=== Trello Boards ===
(l) List open boards
(d) Done adding boards
Or enter a board URL or ID
>

=== Project Description ===
Brief description (Enter to skip): pet care sites for takecareofmydogs.com and takecareofmycats.com

=== Client Contacts ===
Contact name (Enter to skip): Andrew Miller
Role/title: Owner
Email: andrew@84em.com
Another contact (Enter to finish):

=== Toggl Time Tracking ===
Does this project use Toggl? (y/n): n

=== GitHub Repositories ===
(1) Search repositories
```

# 2...

```
=== Codebase Symlinks ===
```

```
Link local codebases into this KB's Projects/ directory.
```

```
Label for this codebase (e.g., main-site, staging) [Enter to skip]: takecareofmycats.com
```

```
Path to codebase (e.g., /home/andrew/workspace/sitename): /home/andrew/workspace/takecareofmycats.com/
```

```
Added: Projects/takecareofmycats.com/app -> /home/andrew/workspace/takecareofmycats.com/
```

```
Add another codebase? Label [Enter to finish]: takecareofmydogs.com
```

```
Path to codebase (e.g., /home/andrew/workspace/sitename): /home/andrew/workspace/takecareofmydogs.com/
```

```
Added: Projects/takecareofmydogs.com/app -> /home/andrew/workspace/takecareofmydogs.com/
```

```
Add another codebase? Label [Enter to finish]:
```

```
=== Gmail Label ===
```

```
Does this project have a Gmail label? (y/n): n
```

```
Creating knowledgebase...
```

```
Symlink: Projects/takecareofmycats.com/app -> /home/andrew/workspace/takecareofmycats.com/
```

```
Symlink: Projects/takecareofmydogs.com/app -> /home/andrew/workspace/takecareofmydogs.com/
```

```
Initialized empty Git repository in /home/andrew/workspace/Clients/TakeCarePets/.git/
```

```
[main (root-commit) 7ddf2e4] feat: initialize TakeCarePets client knowledgebase
```

```
14 files changed, 593 insertions(+)
```

```
create mode 100644 .gitignore
```

```
create mode 100644 AGENTS.md
```

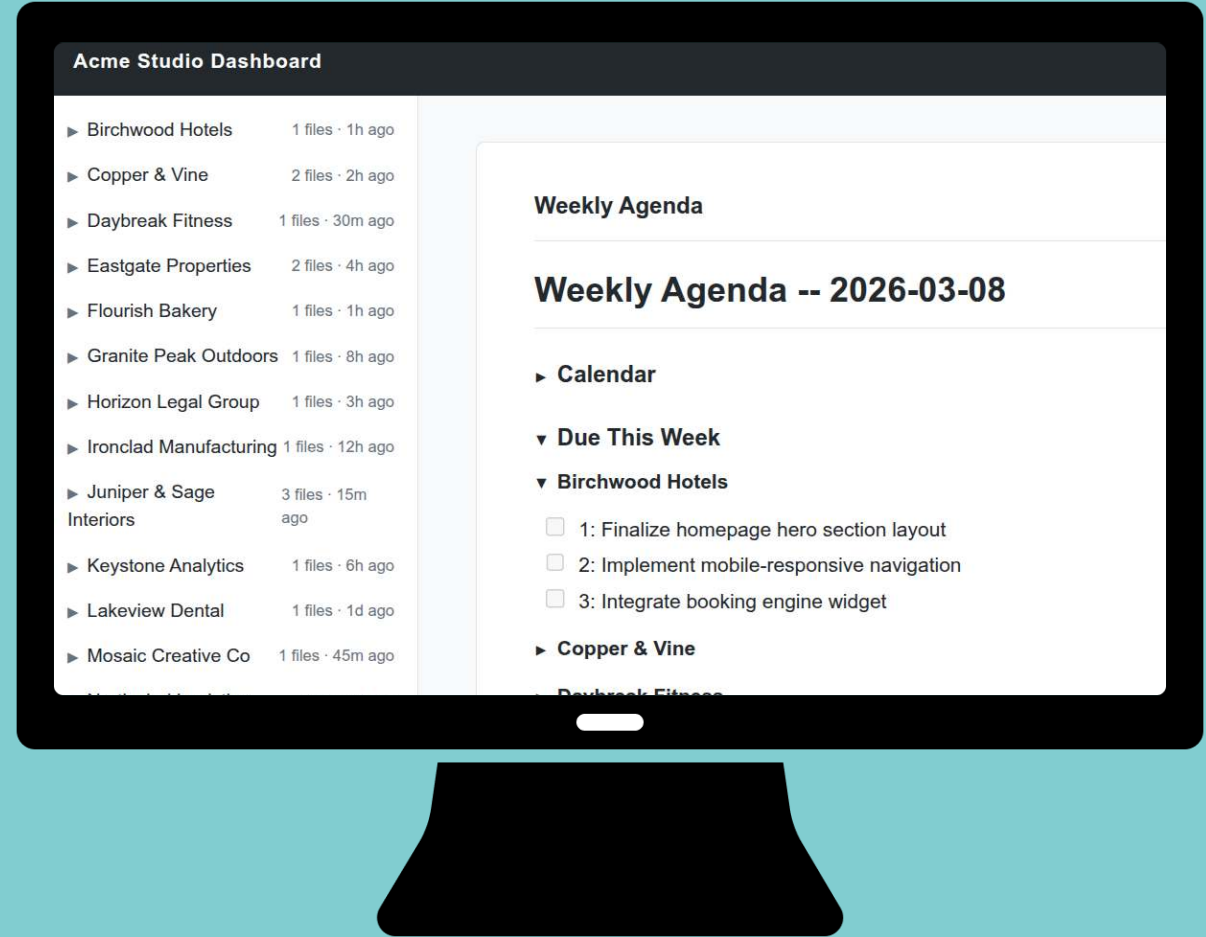
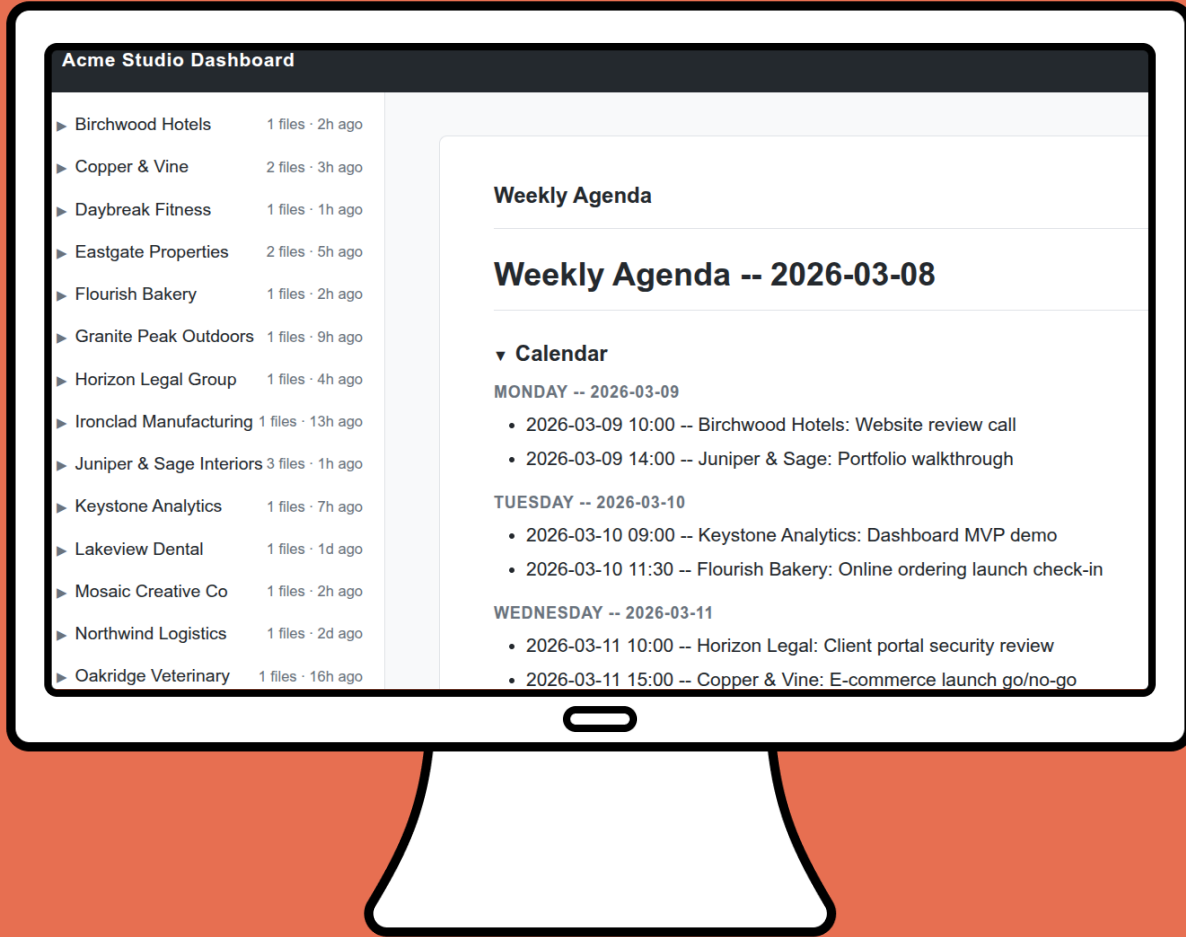
```
create mode 100644 CLAUDE.md
```

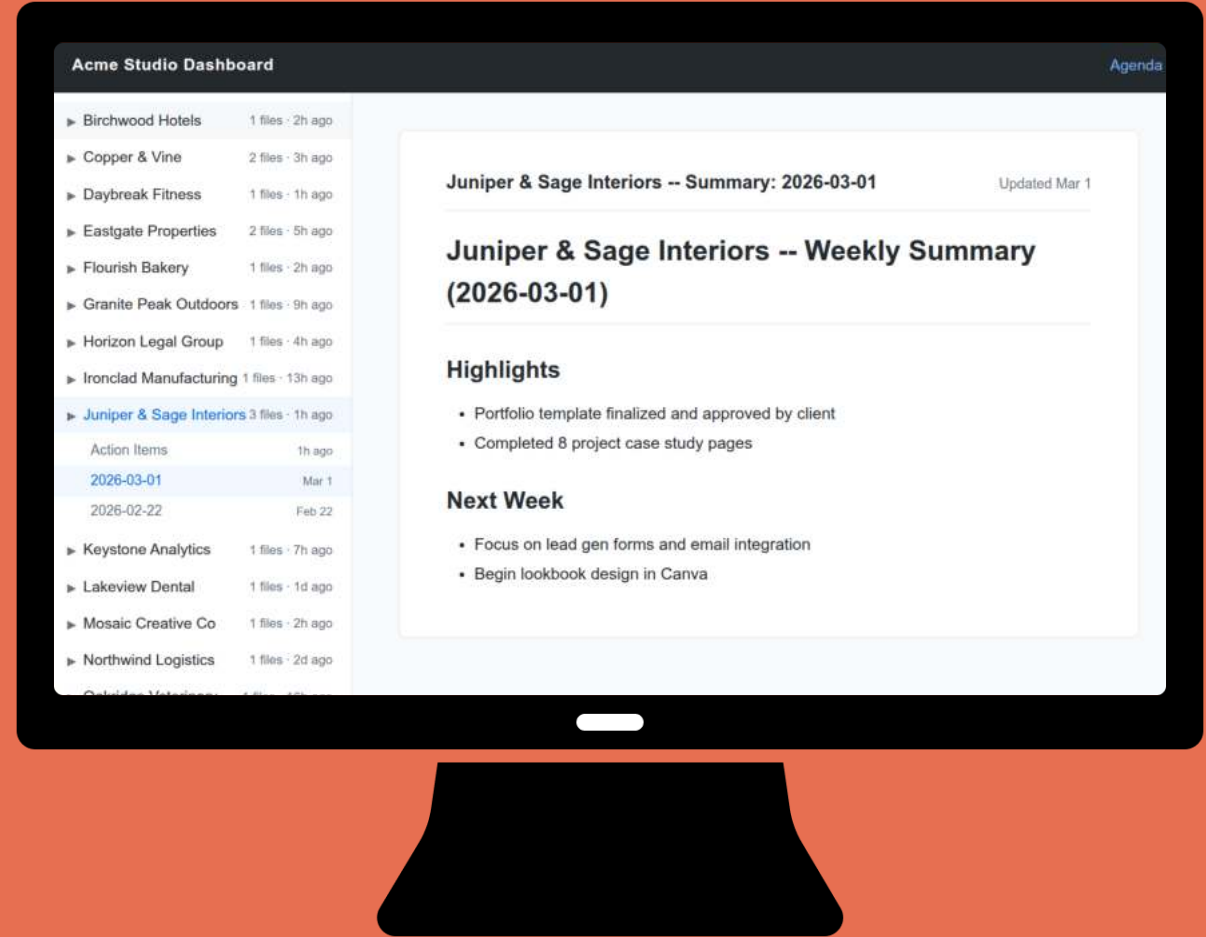
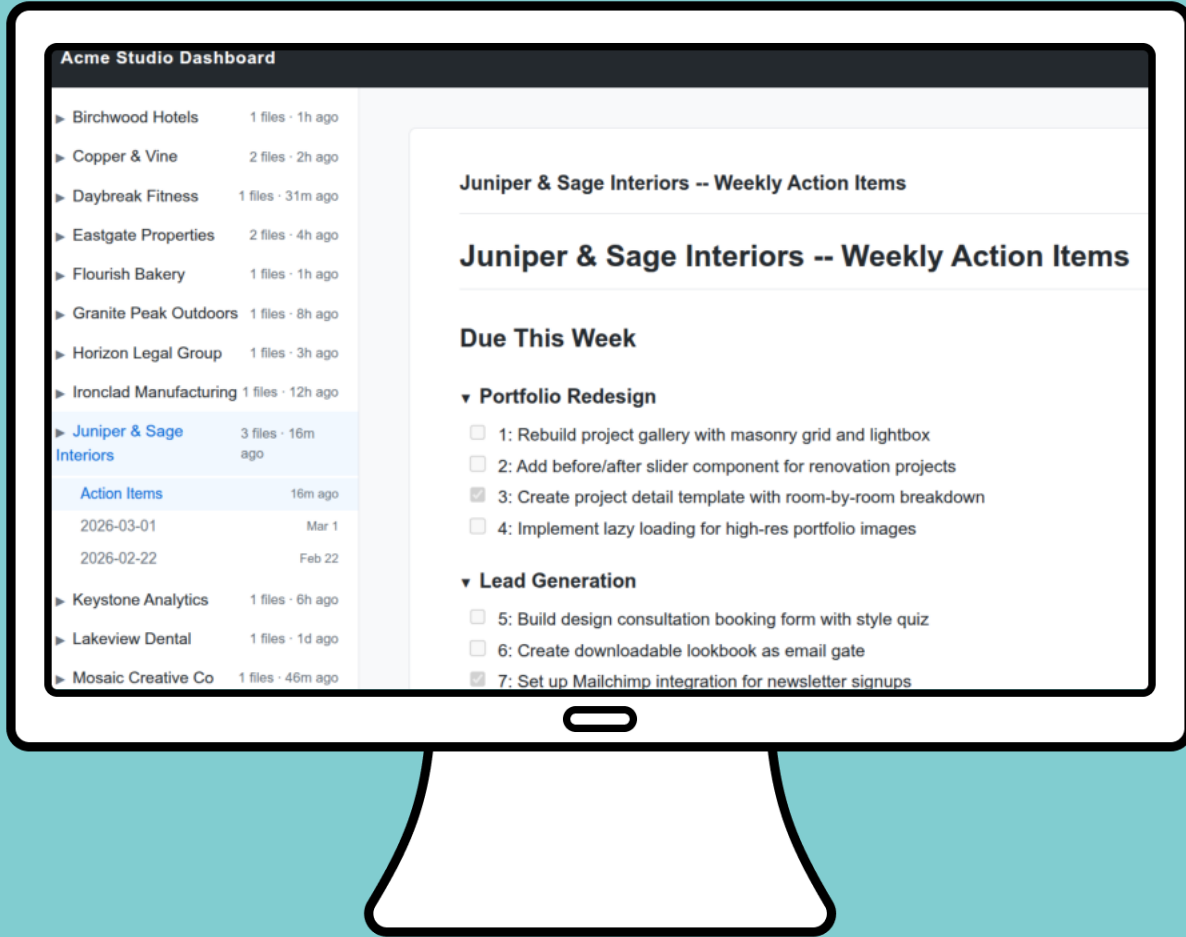
...1!

```
=====
Done. Client knowledgebase created at:
/home/andrew/workspace/Clients/TakeCarePets
=====

=== Configured ===
Gmail:      not matched
Trello:     none
Description: pet care sites for takecareofmydogs.com and takecareofmycats
Contacts:   1 added
Toggl:      not used
GitHub:     https://github.com/84emllc/takecareofmycats/ https://github.com/84emllc/takecareofmycats
Codebases:  2 linked

=== Remaining TODOs ===
1. Add boards to trello-boards.json
2. Update CLAUDE.md with board info
3. Run: ./scripts/trello-export.sh
4. Add GMAIL_LABEL to .env
5. Edit label-rules.json to customize keyword rules for this client
6. Verify Gmail export: ../scripts/gmail-export.sh --dry-run
```





# CONNECTING THE TOOLS



## EXISTING MCPs

Off-the-shelf solutions for quick integration

*(Slack, n8n)*



## Extending or building MCPs

Modify existing solutions OR build my own.

*(Teamwork, Asana, Trello, Slack, etc.)*



## Custom Scripts

Python, Typescript, Bash, etc.

*(Gmail & Calendar export, agenda builder, dashboard)*

# THE GUARDRAILS

Automation with human oversight. Nothing goes out without review.



## Claude does:

- ✓ Draft
- ✓ Analyze
- ✓ Organize
- ✓ Sync
- ✓ Build & Maintain
- ✓ Manage a complete KB



## Claude does not:

- ✗ Interact with clients
- ✗ Work without human guidance
- ✗ Have free autonomous reign over my entire work and personal life organizing and making decisions for me because OMG I have seen how that movie ends.



**TAKING ON THE BIG DOGS.**

# WHAT CHANGED

## BEFORE

---

- ✗ Manual client onboarding setup
- ✗ Separate logins for cross-tool tracking
- ✗ Manual lead qualification review
- ✗ Manual weekly planning compilation

## AFTER

---

- ✓ Single script for client onboarding
- ✓ Unified Trello board for cross-tool tracking
- ✓ AI-assisted lead qualification assessment
- ✓ Automated agenda generation for weekly planning

Significant improvements in efficiency and automation = more money for pup cups.



**"THIS STUFF IS COOL"**

- LEONARD THE HOUSE LEOPARD

**"TOTALLY"**

- GILDA JUDY MILLER

## Key Takeaways

# KEY TAKEAWAYS

- ✓ **Markdown file KB provides structured context for AI.**
- ✓ **MCPs enable flexible tool integration.**
- ✓ **Automate preparation, not decisions, with clear guardrails.**

**ANDREW  
MILLER**

**84EM.TO**

