KING AI & AUTOMATION

A GUIDE FROM KING AI & AUTOMATION

The Move to Claude Kit

Switch from ChatGPT to Claude without losing a thing your AI already knows about you.

Who this is for

You run a business. You've used ChatGPT for a while and it's genuinely useful: it knows your business, your customers, how you like things written. But the hype right now is around Claude, and you're curious.

So what's stopping you? For most owners I speak to, it's one thing: **everything ChatGPT has learned about you lives in ChatGPT.** Months of context: your preferences, your pricing, your team. Starting fresh feels like training a new hire from scratch. So you stay put.

This kit fixes that. In about 30 minutes you'll move everything across. Nothing gets deleted, ChatGPT stays where it is, and you end up with a Claude that knows your business, possibly better than ChatGPT did. Page 3 explains why.

Two moves, not one

ChatGPT holds what it knows about you in two places, and they go to two different homes in Claude:

- **ChatGPT's memory and your Custom Instructions** (what it's learned about you across all your chats, plus the standing preferences under Personalization that shape every new chat) move into **Claude's memory**, its direct equivalent. Even a brand-new chat will know you.
- **Your custom GPTs and ChatGPT Projects** (job-specific setups with their own separate instructions and files) become **Claude Projects**, the equivalent workspaces. A custom GPT never sees your memory or Custom Instructions unless you've pasted them in yourself, so this second move genuinely is a different job from the first.

The plan

1

Get your memory out

ChatGPT writes down everything it knows about you. You save it.

2

The Import Interview

Claude quizzes you on it and fixes what's gone stale.

3

Save it to memory

The refreshed version goes into Claude's memory via its import screen.

4

Rebuild your GPTs

Each custom GPT you actually use becomes a Claude Project.

You'll need: your ChatGPT account, a Claude account at claude.ai (memory is on the no-cost plan; Projects need the paid plan, about £15 a month), and somewhere to save a document. No technical skills needed.

Step 1 Get your memory out of ChatGPT

This first transfer covers everything that applies everywhere in ChatGPT: your **memory** (the facts it's quietly saved from months of chats), your **Custom Instructions** (the standing preferences under Personalization that shape every new chat), and your past conversations. Neither memory nor Custom Instructions reaches your custom GPTs or Projects, those run on their own separate instructions and don't see either at all, so they wait for Step 4. It's two different jobs below, because it's two different sources: one screen hands you your Custom Instructions verbatim, nothing else can; a prompt in a new chat turns everything else, your memory bank and your conversation history, into one document.

First: the settings screen

Click your **profile icon** (bottom-left) → **Settings** → **Personalization** → **Manage memories**

OpenAI moves menus around; if yours looks different it'll still be under Settings, in Personalization.

Check memory is switched on (off means there's nothing to export in the next part), and skim the list of saved facts: delete anything plain wrong, so the junk doesn't travel with you. Then, while you're still on this screen, open a document (Word, Google Docs, or Notes) and copy your two **Custom Instructions** boxes into it, under a heading "My standing instructions". This is the account-wide setting that applies to every chat, not any individual custom GPT's own instructions field, that's a different screen entirely, and it's what you'll handle in Step 4. Nothing later in this kit can retrieve this text for you, so grab it now while it's in front of you.

Then: the memory dump prompt

Open a **new chat** in ChatGPT. Click the model name at the top and switch to **GPT-5.6 Sol** if you're on a paid plan (Plus or Pro); it digs deepest into your history. On the no-cost plan, stay on GPT-5.6 Luna and tap **Think** before you send. Paste this in, word for word:

OpenAI renames these every few months. If you don't see this exact option, pick whichever model is labelled as the most capable or the deepest-reasoning one available to you.

COPY THIS PROMPT INTO CHATGPT

I'm moving my memory to a new AI assistant and I don't want to lose anything you've learned about me. Write out everything you know about me, my business, and my preferences, from your memory and our past conversations (not my Custom Instructions, I've copied those separately). Organise it under these headings:

1. Me: name, role, and how I like to work
2. My business: what it is, who it serves, and how it makes money
3. People: my team, clients, and anyone I mention often
4. Tools and systems I use
5. My preferences: tone, formats, and anything I've told you to always or never do
6. Current projects, goals, and numbers
7. Anything else worth carrying over

Write in full sentences and be specific; more detail is better. If you're not sure something is still true, include it anyway and mark it "CHECK THIS".

If it stops partway through, reply "carry on". When it's done, copy the whole answer into the **same document** you started earlier (the one with "My standing instructions" in it), under a new heading, **"My AI Memory"**. Save the document. One file now holds both jobs: your Custom Instructions, copied straight off the settings screen, and everything else, written out by the prompt above.

Step 2 The Import Interview

Claude has a built-in import screen that would take your document as-is, and we'll use it in Step 3. Don't paste anything yet. This part is the one most people skip, and it's the most valuable ten minutes of the move.

Your ChatGPT memory is a **photo of your business from months ago**. The prices you charged when you first mentioned them. The employee who's since left. The goal you set in January and quietly replaced in May. Nobody goes back to correct these things. Import it as-is and your new assistant starts life loaded with old news.

So before it's saved anywhere, make Claude **interview you** about what it's inheriting. Start a new chat at claude.ai and paste this, with your "My AI Memory" document underneath:

COPY THIS PROMPT INTO A NEW CLAUDE CHAT, THEN PASTE YOUR DOCUMENT BELOW IT

Below is everything my old AI assistant knew about me and my business. Read it carefully. Before I save it as your memory, I want you to interview me about it: one question at a time, waiting for my answer before you ask the next.

Focus on anything that looks out of date, vague, contradictory, or missing. Assume some of it is stale: prices, team members, tools, and goals all change. Anything marked "CHECK THIS" gets checked first. Don't stop until you're confident you understand my business as it is today.

When you're done, write out a full corrected version of the document in one block I can copy.

Then just answer. It takes 10 to 15 minutes, and most owners are surprised how much has changed: "we don't use that tool any more", "that price went up twice". When it finishes, Claude writes out the refreshed document. Copy it, and update your saved file too.

Step 3 Save it as Claude's memory

Now the refreshed version becomes what Claude permanently knows about you, in every chat, without being asked:

At claude.ai: **Settings** → **Memory** → **Start import** → paste the refreshed document → **Add to memory**

On some accounts Memory sits under Settings then Capabilities; either way, find the memory section and its import option.

Usually within a few minutes Claude turns it into organised memory entries you can read on the same screen (on some accounts it can take longer). Fix anything right there (there's a box for telling Claude what to change or remove), or just say it in any chat: "remember that our sourcing fee is now £3,500". Claude updates its memory on the spot.

> **An honest note.** Anthropic labels memory import experimental, and says Claude's memory is designed to focus on work-related topics. In practice it keeps the business material and can drop personal odds and ends. That's why you kept the document: skim the saved entries once and tell Claude anything it missed. You haven't just moved your memory, you've brought it up to date for the first time since you started using AI.

> **Why this ends up better than before.** A ChatGPT custom GPT starts blind: it ignores your memory and your Custom Instructions unless you've pasted that in yourself, so every one you built had to

Step 4 Rebuild your custom GPTs as Claude Projects

Memory covers what Claude knows about you everywhere. Your **custom GPTs and ChatGPT Projects** are the second transfer: job-specific setups with their own instructions and files. Claude's equivalent is a **Project**: a workspace with its own instructions box and files, and every chat inside it starts pre-loaded with both. For each one you actually use:

1. **Copy the brains out.** In ChatGPT, open the GPT's edit or configure view and copy its instructions. Note its files.
2. **Create the Project.** At claude.ai, go to **Projects**, click **New project**, and name it after the job.
3. **Move the pieces in.** Paste the instructions into the project's instructions box; upload the same files to its knowledge area.
4. **Run a two-minute interview.** First chat: "Read your instructions and files, then ask me up to three questions about anything unclear or out of date."

Most owners find one or two Projects are all they need. Each one also keeps its own separate memory, so a "Proposal Writer" learns its job without muddying the rest.

Day one: prove it moved

Three things to try this week; a plain chat now knows your business.

- **Dictate a messy brief.** Talk into your phone for a minute, half-formed thoughts and all, and ask Claude to turn it into a tidy plan or a clear email.
- **Have it draft something in your voice.** "Draft a reply to a customer who's unhappy about a delay, in my usual tone."
- **Use it as a second opinion.** Describe a decision you're weighing up and ask what it would want to know before deciding.

And nothing here is irreversible. ChatGPT is untouched and your document is saved, so run both side by side and see which earns the seat.

THE NEXT STEP

Moving tools is step one. Knowing where AI saves you the most time is step two.

You've now got an AI that knows your business. The bigger question is where to point it. That's what I do: no pitch, no jargon, just a clear picture of what's worth automating first.

Book your 30-minute AI assessment →

I build for owners of service businesses turning over £1M to £10M a year, with 10 to 50 staff: trades, hire, hospitality, agencies, clinics, estate and letting agents. Everything in this kit, and everything I build, works in any industry.

Dylan King
Founder, King AI & Automation

dylan@kingaiandautomation.co.uk
kingaiandautomation.co.uk · Instagram @dylanaiking