

Agentic AI for Leaders

Setup Checklist — Complete before Session 1

Work through these 11 steps in order. Budget 2–3 hours total. Check off each step as you complete it.

Step	What	Time	Status	Done
Part 1 — Builder Stack				
1	Terminal Basics	~15 min	Required	<input type="checkbox"/>
2	Code Editor + Extensions	~15 min	Required	<input type="checkbox"/>
3	Git	~10 min	Required	<input type="checkbox"/>
4	GitHub	~15 min	Required	<input type="checkbox"/>
5	AI Coding CLIs	~15 min	Required	<input type="checkbox"/>
6	AI Registry + Plugins	~20 min	Optional	<input type="checkbox"/>
7	Voice to Text	~10 min	Optional	<input type="checkbox"/>
Part 2 — AI Platform Setup				
8	AI Platform Accounts	~10 min	Required	<input type="checkbox"/>
9	Personalization	~15 min	Recommended	<input type="checkbox"/>
10	Memory Systems	~10 min	Recommended	<input type="checkbox"/>
11	MCP Connections	~15 min	Optional	<input type="checkbox"/>

Full instructions with screenshots: handsonai.info/courses/leaders/setup-checklist/

Part 1 — Builder Stack

Step 1: Terminal Basics

Open your terminal: **Mac** — Cmd+Space, type Terminal. **Windows** — Start → PowerShell.

Practice: `pwd` (Mac) or `Get-Location` (Windows) to see your current directory.

You know it worked when:

- Terminal opens and shows a prompt (\$ or % or >)
- `pwd` / `Get-Location` prints a directory path

Ask AI for help:

```
I'm learning to use the terminal on [Mac / Windows] and ran into this issue: [describe what happened]. What should I try?
```

Step 2: Code Editor + Extensions

Install **Cursor** (cursor.com) or **VS Code** (code.visualstudio.com).

Open Extensions (Cmd/Ctrl+Shift+X) → search and install an AI extension (Claude Code, Codex, or Gemini Code Assist).

You know it worked when:

- Editor opens and File → Open Folder shows files in the sidebar
- At least one AI extension installed (Claude Code, Codex, or Gemini Code Assist)

Ask AI for help:

```
I'm setting up [Cursor / VS Code] on [Mac / Windows] and running into: [describe issue]. What should I try?
```

Step 3: Git

Mac: Run `xcode-select --install` in Terminal.

Windows: Download from git-scm.com and run installer (use defaults).

You know it worked when:

- `git --version` prints a version number

Ask AI for help:

```
I'm trying to install Git on [Mac / Windows] and getting: [paste error]. What should I try?
```

Step 4: GitHub

Create account at github.com. Clone a repo: Cmd/Ctrl+Shift+P → Git: Clone → paste URL.

You know it worked when:

- GitHub account created
- Cloned repo files appear in editor sidebar
- `git status` shows 'On branch main'

Ask AI for help:

```
I'm trying to clone a GitHub repo in [Cursor / VS Code] and getting: [paste error]. What should I try?
```

Step 5: AI Coding CLIs (Claude Code)

Mac/Linux: `curl -fsSL https://claude.ai/install.sh | bash`

Windows: `irm https://claude.ai/install.ps1 | iex`

Then run `claude` and follow sign-in prompts.

You know it worked when:

- `claude --version` prints a version number
- `claude` starts a conversation in the terminal

Ask AI for help:

```
I'm trying to install Claude Code on [Mac / Windows] and getting: [paste error]. What should I try?
```

Step 6: AI Registry + Plugins (Optional)

Open the Notion AI Registry template (link on setup checklist page) → click Duplicate.

In Claude Code: `/plugin marketplace add jamesgray-ai/handsonai`

Then: `/plugin install business-first-ai@handsonai`

You know it worked when:

- Four databases visible in Notion workspace
- Plugin commands run without errors in Claude Code

Step 7: Voice to Text (Optional)

Install **Wispr Flow** (wisprflow.ai) or enable **Claude Desktop Quick Entry**.

Grant microphone permissions when prompted.

You know it worked when:

- Voice dictation works in any text field

Part 2 — AI Platform Setup

You only need **one** platform set up. Use whichever you prefer.

Step 8: AI Platform Accounts

ChatGPT: chat.openai.com → Sign up → Upgrade to Plus (\$20/mo)

Claude: claude.ai → Sign up → Upgrade to Pro (\$20/mo)

Gemini: gemini.google.com → Sign in → Upgrade to Advanced (\$20/mo)

You know it worked when:

- Paid account active on at least one platform
- Can start a conversation and get a response

Step 9: Personalization / Custom Instructions

ChatGPT: Profile picture → Customize ChatGPT → fill both sections

Claude: Initials → Settings → Profile preferences

Gemini: Profile → Settings → Personalization

Starter template: "I'm a [role] in [industry]. I'm learning to build AI-powered workflows and agents. I prefer concise answers with practical examples."

You know it worked when:

- Custom instructions / preferences saved

Ask AI for help:

```
I'm trying to set up custom instructions in [ChatGPT / Claude / Gemini] and can't find the setting. Where do I go?
```

Step 10: Memory Systems

ChatGPT: Profile → Settings → Personalization → toggle Memory on

Claude: Initials → Settings → toggle Memory on

Gemini (personal): Settings → Saved Info — memory builds automatically

Gemini (Workspace): Automated memory may not be available — check with your admin

You know it worked when:

- Memory toggle is on

Ask AI for help:

```
I'm trying to enable memory in [ChatGPT / Claude / Gemini] but can't find the toggle. I'm on [web / desktop] with a [Free / Plus / Pro] plan. Where do I look?
```

Step 11: MCP Connections (Optional)

Claude (web): Settings → Connectors → browse directory or add custom MCP server URL

Claude Desktop: Connectors + local MCP servers (see handsonai.info/mcp-server/)

Claude Cowork: Inherits your connectors and MCP servers automatically

ChatGPT: Profile → Settings → Connected Apps → connect integrations

Gemini: Settings → Extensions → enable Google Workspace, etc.

You know it worked when:

At least one external tool or MCP server connected

Quick Reference Card

Verification Commands

Terminal	<code>pwd (Mac) / Get-Location (Windows)</code>
Git	<code>git --version</code>
GitHub	<code>git status (inside cloned repo)</code>
Claude Code	<code>claude --version</code>

Platform Settings Paths

Platform	Personalization	Memory
ChatGPT	Profile pic → Customize ChatGPT	Settings → Personalization → Memory
Claude	Initials → Settings → Preferences	Initials → Settings → Memory
Gemini	Profile → Settings	Settings → Saved Info (personal only)

"Ask AI for Help" Template

Copy and paste this into any AI chat when you get stuck:

```
I'm following the Agentic AI for Leaders setup checklist and I'm stuck on Step [number]: [step name]. I'm on [Mac / Windows] and here's what happened: [describe the issue or paste the error message]. What should I try next?
```

Full interactive checklist: handsonai.info/courses/leaders/setup-checklist/

Course page: handsonai.info/courses/leaders/