

A PRACTICAL FIELD GUIDE

# A Marketing Director's *Guide to Claude*

## Part 1

Six high-leverage workflows, ready-to-run prompts and a setup method for marketing teams ready to move past random acts of AI.

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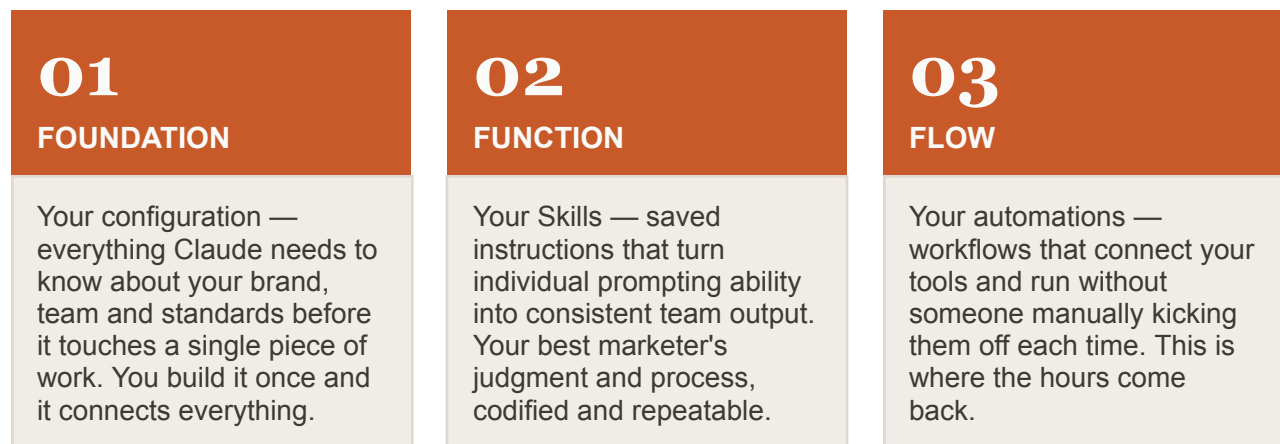
## INTRODUCING THE 3F MODEL

# The 3F Model

Your team is using Claude like a vending machine — hitting it differently every time and hoping for a better output. Every person has their own approach, outputs vary wildly depending on who ran the prompt and the two or three people who actually know what they're doing are pulling further ahead while everyone else falls behind.

Every other part of your marketing operation runs on shared infrastructure. Your AI usage should too.

The 3F Model gives you that infrastructure. Three layers — Foundation, Function, Flow — built in sequence, each one making the next more powerful. This guide covers Foundation, the layer most marketing teams skip entirely and the reason most get inconsistent results.



This guide covers Foundation.

In my experience working with marketing teams at companies like L'Oreal, HP and Autodesk, it is the layer that gets skipped most often and costs the most in wasted output and inconsistent results.

Parts two and three cover Function and Flow. For now, start here.

This guide covers Foundation — Part 1 of 3 in the 3F Model series — Parts 2 and 3 cover Function and Flow.

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# What's Inside

This guide is built for marketing leaders who need to move fast. Every section covers a specific problem with a method you can run today.

The prompts are written for Claude but the logic transfers to any frontier model.

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- Claude Explained for Marketing Teams
- How to Configure Claude Before You Start
- Five Prompting Principles That Change Output Quality

## PART TWO · WORKFLOWS

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- Workflow 02 · The Brand Voice Engine
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- Projects, Skills and Connected Tools
- A Note on Governance and Accountability

PART ONE

# Foundation

## CLAUDE EXPLAINED

# How to Use Claude

Claude is an AI assistant built by Anthropic.

You feed it a brief, a data export, a brand document or a competitive analysis and it works through it. It can hold context across a long conversation, follow a multi-step process and produce consistent output when you run the same task twice.

For marketing leaders, this means you can hand off the work that eats hours but requires no judgment: first-draft copy, reporting narrative, audience segmentation framing, competitive positioning maps, brief analysis.

You still need to focus on the strategy, but Claude removes the friction between the strategy and the output.

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## CLAUDE CHAT

The core interface. Available on web, desktop and mobile. You write a prompt, upload files, images or documents and Claude responds. This is where 90% of your work happens.

## CLAUDE COWORK

Triggered when you ask Claude to work inside a connected platform (Notion, Google Drive, Gmail). Where Chat is conversational, Cowork is autonomous. You give it a task and it executes the full workflow while you are doing something else.

## CLAUDE CODE

A developer tool that gives Claude access to local files and the command line. Worth knowing it exists when you work with engineers who build marketing infrastructure.

<b>WORKS WITH</b> Text, PDFs, images, spreadsheets, briefs, brand docs, data exports	<b>CONNECTS TO</b> Google Drive, Gmail, Notion, Canva, Slack and more via MCP	<b>BEST FOR</b> Repetitive cognitive work your team shouldn't spend hours on	<b>ACCESS</b> Claude.ai · Free or Pro plan. Pro unlocks longer context and priority access
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## SETTING UP CLAUDE

# The Essential 5-Minute Set Up

Most people skip this step. They open Claude and start typing. The output is generic because Claude has no context about who you are or what you need.

Five minutes of setup changes everything that follows.

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### STEP 1 · FILL IN YOUR PROFILE

Go to Settings > Profile. Enter your role, your industry, the team you lead and how you prefer to communicate. Claude applies this to every response without you repeating it. Write it as if you are briefing a new senior contractor on their first day.

### STEP 2 · SET UP A PROJECT FOR YOUR TEAM

A Project is a persistent workspace. Create one called 'Marketing Team' and load it with your brand voice guidelines, your current campaign brief, your ICP document and your messaging hierarchy. Every conversation inside that Project inherits all of it automatically. You stop re-briefing Claude every session.

### STEP 3 · UPLOAD YOUR REFERENCE DOCS

Brand guidelines, competitor positioning maps, past campaign performance summaries. The more context Claude has, the less you have to explain. Treat it the way you would onboard a senior agency partner.

### STEP 4 · IMPORT MEMORY FROM ANOTHER TOOL

If you have been using ChatGPT, you can import your memory via Settings > Capabilities > Import memory from other AI providers.

## PROJECT SETUP CHECKLIST

- |  |
|--|
| ✓ Brand voice and tone guidelines (PDF or pasted text)                     |
| ✓ Current campaign brief or quarterly marketing plan                       |
| ✓ ICP definition and persona documentation                                 |
| ✓ Messaging hierarchy and approved claims                                  |
| ✓ Competitor positioning summary or battle cards                           |
| ✓ System prompt: your role, your team size and what good output looks like |

## MEMORY AND CONTEXT MANAGEMENT

# What Claude Remembers

Understanding Claude's memory and context levels will give you better outputs and save your monthly credits.

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### LEVEL 1 · WITHIN A CONVERSATION

Claude holds everything discussed in a single session and uses it to inform every subsequent response. The longer and richer the conversation, the more context it has to work with. This is why continuing an existing conversation produces better output than starting a new one for the same project.

### LEVEL 2 · ACROSS CONVERSATIONS, VIA PROJECTS

Everything loaded into a Project — your brand guidelines, your ICP, your messaging hierarchy — persists across every session your team opens inside that project. This is your long-term memory. It's also where most teams underinvest. A Project with three focused documents will produce noticeably better output than one stuffed with everything you have ever written.

### LEVEL 3 · CLAUDE'S OWN MEMORY

Claude can generate memories from your conversations and surface them in future sessions. You can view, edit and delete these at any time via Settings > Capabilities. For a marketing team, this is useful for working preferences and communication style but should not replace the structured context you load into a Project.

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## CREDIT USAGE

Long conversations with large uploaded files consume more credits than short ones. If your team is running multiple heavy sessions simultaneously, you will burn through your allocation faster than your billing cycle expects.

The practical fix is to keep your Project documents tight and current. Load what Claude needs, not everything you have. A sharp 10-page voice guide costs less per session than a 200-page brand bible and produces more efficient output.

Cowork tasks run longer context windows than Chat sessions and consume credits at a higher rate. We'll cover this in more detail in Part Three of the 3F Model.

**Tip:** Type `/compress` in any chat to condense the full conversation history into a compact summary. It preserves your context, reduces the processing load and keeps your credit consumption in check.

## PROMPTING PRINCIPLES

# How to Improve Your Outputs

Weak prompts produce weak output. These five principles apply across every workflow.

## 01

### GIVE IT A ROLE

Tell Claude who it is before you ask it anything. 'You are a senior B2B content strategist reviewing this for a mid-market SaaS brand.' The more specific the role, the more calibrated the output. A generic prompt gets a generic response.

## 02

### SPECIFY THE FORMAT

Don't leave the format to chance. Tell Claude exactly what you want back: 'Return three options as a numbered list.' 'Write this as a single executive summary paragraph, 120 words maximum.'

## 03

### STATE WHAT TO AVOID

Tell Claude what it cannot do, as well as what it should do. 'No corporate language.' 'Do not recommend paid social.' Exclusions tighten the output faster than adding more instructions.

## 04

### UPLOAD THE EVIDENCE

Claude works best when it has source material. Upload the brief, the data export, the competitor's landing page, the research report. Tell it what to pull from each file and what decision it is helping you make.

## 05

### ITERATE ON WHAT YOU HAVE

When the first output is not right, do not start over. Tell Claude what to change and why. 'The second option is closest, push it further in tone.' 'This is too tactical. Rewrite for a CMO audience.' You are building toward the right output, not regenerating from scratch.

PART TWO

# The Six Workflows

## WORKFLOW 01

# Campaign Brief Analyst

Upload a brief and Claude interrogates it the way a good strategist would before a kickoff meeting. It surfaces the gaps, assumptions and creative tensions your team will need to resolve.

Use this before any campaign kickoff, any RFP response or any brief you have inherited from another team.

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### Phase 1 · Audit

#### PROMPT

```
You are a senior marketing strategist with 15 years of B2B and B2C experience. I am going to paste a campaign brief below. Read it and do the following: (1) Identify the three strategic assumptions this brief is making that are never stated explicitly. (2) Name the single biggest gap between the stated objective and the tactics proposed. (3) List the three questions a senior creative director would ask before accepting this brief. Do not invent information. Flag anything the brief does not answer.
```

### Phase 2 · Strengthen

#### FOLLOW-UP PROMPT

```
Using only what can be confirmed from the brief, rewrite the objective statement so it is measurable, time-bound and tied to a business outcome rather than a marketing activity. Then write three success metrics the team could track against it. Where the brief does not give you enough information, leave a clearly marked placeholder.
```

#### BEST USED FOR

Campaign kickoffs, agency briefs, inherited briefs, RFP responses, quarterly planning documents

## WORKFLOW 02

# Brand Voice Engine

Upload your existing brand documentation, a sample of approved copy and your website. Claude builds a working brand voice reference your whole team can use to brief agencies, onboard contractors and review copy consistently.

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### Phase 1 · Audit

#### PROMPT

```
I am going to give you three things: a brand guidelines document, a sample of approved copy and our website URL. Your job is to audit the brand voice as a senior copywriter would. From the copy: extract the tone in three words, then write one paragraph proving why those three words are accurate using direct examples from the text. From the website: identify any copy that contradicts the brand guidelines. Do not invent anything. Flag every gap you find.
```

### Phase 2 · Build the Reference

#### FOLLOW-UP PROMPT

```
Using only what was confirmed in the audit, build a brand voice reference guide structured as follows: tone in three words with proof, five phrases the brand uses and five it never uses, three example rewrites showing the difference, and a one-paragraph brief an external agency could use to write in our voice. Where something cannot be confirmed, leave a clearly marked placeholder.
```

#### BEST USED FOR

Agency onboarding, contractor briefs, copy QA, new channel launches, brand refresh projects

### WORKFLOW 03

# Campaign Performance Reporter

Export your campaign data from your analytics platform or media tool and upload it. Claude reads the numbers, identifies what is working and what is not, and writes the performance report.

The average marketing director spends three to five hours per week writing performance commentary. This prompt handles the first draft in under ten minutes.

## Phase 1 · Analyze

### PROMPT

```
You are a senior marketing analyst. I am uploading a campaign performance export. Read it and do the following: (1) Identify the top three performing tactics by the primary KPI in the data. (2) Identify the two lowest performers and state the most likely cause based on what the data shows. (3) Flag any anomalies worth investigating. State your confidence level for each finding and note where the data is insufficient to draw a conclusion.
```

## Phase 2 · Write the Narrative

### FOLLOW-UP PROMPT

```
Write a performance summary for a CMO who has five minutes to read it. Structure it as: one sentence on overall performance against goal, three key findings with the supporting number for each, one recommendation for the next period with the rationale. Maximum 250 words. No bullet points. Use plain language.
```

### BEST USED FOR

Weekly reporting, board-ready summaries, post-campaign analysis, quarterly business reviews

WORKFLOW 04

# Ad Copy Generator

Upload your brand guidelines and brief. Claude researches what is performing in your category and writes four distinct ad concepts tailored to the platform and audience.

PROMPT

```
You are a senior performance marketing copywriter. Before producing anything, ask me: (1) What is the product or offer? (2) What platform are we writing for (Meta, LinkedIn, Google, other) and what format (feed ad, story, search)? (3) Who is the audience – role, industry, pain point? (4) What is the one thing this ad must make the reader feel or believe? Once I answer, write four distinct ad concepts. Each must include: Hook (first line that stops the scroll – a specific claim, a named pain point or a surprising stat, never a question); Body (two sentences maximum, benefit-led and specific); CTA (action-oriented and tied to the offer – 'Get the report,' 'Book your audit,' not 'Learn more'); Tone note (one sentence on why this tone fits this platform and this audience squares). For each concept, write one image or creative direction note: describe the visual in terms of subject, composition, mood and what the viewer's eye should land on first. Do not reference the brand guidelines directly – make every concept self-contained.
```

WORKS ON	BEST USED FOR	UPLOAD FIRST	HOW TO ITERATE
Meta, LinkedIn, Google Display, programmatic, email subject lines, landing page headlines	Campaign launches, A/B test variants, refreshing underperforming ads, briefing creative agencies	Brand guidelines, approved messaging hierarchy, any creative that has already run	Pick the closest concept and push: 'Make this more direct.' 'Rewrite for a CFO audience.'

## WORKFLOW 05

# Competitive Research Analyst

Paste in competitor website copy, ad creative descriptions or positioning documents. Claude maps the competitive landscape, identifies the white space and tells you where your positioning is differentiated and where it is indistinguishable from the category.

This is not a replacement for primary research. It is the fastest way to get a structured first read of a competitive set before you go deeper.

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### Phase 1 · Map the Category

#### PROMPT

```
You are a senior brand strategist. I am going to paste the homepage copy and primary value proposition from three of our competitors. Read each one and do the following: (1) Identify the single claim each competitor is staking most aggressively. (2) Note the audience each one appears to be writing for based on language, tone and specificity. (3) Identify the one claim that all three competitors are making in some form – this is category noise, not a differentiator.
```

### Phase 2 · Find the White Space

#### FOLLOW-UP PROMPT

```
I am now going to paste our own positioning statement and homepage headline. Against the competitive map you built, identify: (1) Where our positioning overlaps with a competitor's, word for word or claim for claim. (2) The one territory no competitor is owning that we could credibly move into. (3) One rewrite of our headline that occupies that territory. Base every finding on what the copy actually says – do not speculate about intent.
```

#### BEST USED FOR

Positioning reviews, messaging refreshes, new market entry, pitch deck competitive slides, quarterly strategy sessions

## WORKFLOW 06

# Audience Builder

Upload your CRM data export, a customer interview transcript, a win/loss analysis or any existing customer research. Claude builds a structured audience profile grounded in what your customers actually said, not what the marketing team assumed.

### Phase 1 · Build the Profile

#### PROMPT

```
You are a senior customer research analyst. I am uploading customer interview transcripts and win/loss data. Read the source material and build an audience profile structured as follows: Role and context (who they are at work, not just their title); Primary problem (the one thing they are trying to fix, in their own words where possible); The trigger (what made them start looking for a solution – the event, not the category); How they evaluate options (what they weigh, who they involve in the decision); What makes them walk away. Cite the source for each claim. Do not infer beyond what the data shows.
```

### Phase 2 · Pressure-Test Your Messaging

#### FOLLOW-UP PROMPT

```
I am going to paste our current homepage headline and value proposition. Read them against the audience profile you built and answer: (1) Does the headline speak to the primary problem or to the category? (2) Does the value proposition address the trigger or does it assume the buyer already knows they need us? (3) Rewrite the headline and first sentence using the language the audience actually uses. Stay within 15 words for the headline.
```

#### UPLOAD BEFORE RUNNING

Interview transcripts, win/loss reports, CRM export, NPS verbatims, sales call notes, support tickets

PART THREE

# Infrastructure

## PROJECTS & SKILLS

# Build the System

Knowing the difference between Projects and Skills is what moves you from occasionally useful outputs to a system your whole team runs reliably.

### PROJECTS · PERSISTENT CONTEXT

A Project is a workspace with memory. Load it with your brand guidelines, campaign brief, ICP and messaging hierarchy and every conversation inside it inherits that context. You stop re-briefing Claude every session and you get consistent output.

### SKILLS · REPEATABLE WORKFLOWS

A Skill is a saved job description for Claude. You write the instructions once — the role, the rules, the output format — and every time you trigger that Skill, Claude is ready to do the job the way you specified.

**Note:** We'll spend more time unpacking how to create and use Skills in Part 2 of the 3F Model.

### CONNECTED TOOLS VIA MCP

MCP connectors link Claude directly to the platforms your team already uses. Once connected, Claude can read from and act inside those tools.

<b>GOOGLE DRIVE</b> Pull briefs, search documents and reference campaign files without leaving the conversation.	<b>NOTION</b> Read, create and update pages using plain language. No tab-switching.	<b>GMAIL</b> Draft client-facing copy, agency briefs and approval requests in your voice.	<b>CANVA</b> Give Claude approved copy and tell it to populate a social template directly.
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**To connect:** From the Customize section, select Connectors, then click the + icon > Browse Connectors.

## A NOTE ON ACCOUNTABILITY

# Human-in-the-Loop

Claude generates content based on what you give it. That means the quality of the output depends entirely on the quality of the input and the critical eye you apply before anything leaves your team.

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## RULES FOR EVERY WORKFLOW

- **Don't** publish AI-generated copy without a human editor evaluating it against your brand guidelines. Claude will produce fluent, plausible copy but it still requires your judgment.
- **Don't** treat performance analysis as fact without verifying the numbers against your primary data source.
- **Don't** use competitor copy or campaigns as direct inputs if you want Claude to replicate them. Use them as reference for analysis only.
- **Don't** assume claims generated in any prompt are factually accurate without checking. Claude will fill gaps with plausible language.
- **Don't** share confidential client data with Claude unless your organisation has reviewed Anthropic's data and privacy policies and determined it's within your data governance guidelines.
- **Do** review your Project documents quarterly. Outdated reference material produces outdated output.
- **Do** tell Claude when it is wrong. Correcting it in the conversation improves the outputs that follow in that session.

## THE REVIEWER'S CHECKLIST

- |  |
|--|
| ✓ Does this match our brand voice guidelines?                    |
| ✓ Can every claim here be substantiated?                         |
| ✓ Has a human read this end-to-end before it leaves the team?    |
| ✓ Does the data analysis reference the source it was drawn from? |

## GOVERNANCE

# Roles, Responsibilities & Guardrails

Before you roll the 3F Model out to your team, three operational decisions need to be made.

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### DECISION 1 · WHO OWNS THE CONFIGURATION

One person should be responsible for the setup — the system prompt, the reference documents and the brand guidelines loaded into Claude.

Treat this the way you would treat ownership of your brand guidelines document. It needs a named owner, a review cadence and a process for updating it when your brand, messaging or team changes.

### DECISION 2 · WHO CAN BUILD AND MODIFY SKILLS

Skills codify judgment. A poorly built Skill produces consistently wrong output at scale, which is worse than inconsistent output from ad hoc prompting. Before your team starts building Skills in Part Two, decide who has the authority to create, modify and retire them.

A practical starting point: one or two people build and test Skills, the rest of the team uses them. Expand that group as your Skills library matures and your team builds confidence with the format.

### DECISION 3 · HOW YOU TRACK CREDIT CONSUMPTION

Claude usage scales with team size and task complexity. Assign someone to review consumption monthly and set a threshold that triggers a review before you hit your limit. This is a five-minute task that prevents an awkward conversation with your finance team.

**WHAT'S NEXT**

# Build Your Marketing Workflows

Reading about a workflow and running it are different experiences.

I'm hosting a two-hour workshop on May 26 where we build a competitive intelligence system that replaced four hours of weekly analyst time at L'Oreal, and a transcript automation that cuts content production from two days to under thirty minutes.

Every step is demonstrated, so you can replicate it for your brand.

\$249. May 26. Seats are limited.

Learn more at [Maven](#).