

A PRACTICAL FIELD GUIDE

# A Marketing Director's *Guide to Claude*

## Part 2

Six Skills your marketing team can run today, plus the Projects, Artifacts and governance that turn individual effort into consistent output at scale.

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Tahnee Perry · Founder, A25 · AI Strategy & Go-to-Market



INTRODUCING THE 3F MODEL

# The 3F Model

[Part 1 of this series](#) gave your team a Foundation: the configuration, context and prompting principles Claude needs before you start working.

Most teams stop there.

They get better outputs than they had before, but they're still running on individual effort.

**Function** is the layer that changes that.

It's the system your team uses to get consistent output at scale: Projects that contain the context for your campaigns, Skills that codify your best process and run it the same way every time, and Artifacts that allow your team to create interactive applications.

## 01

### FOUNDATION

Your configuration — everything Claude needs to know about your brand, team and standards before it touches a single piece of work. You build it once and it connects everything.

## 02

### FUNCTION

Your Skills — saved instructions that turn individual prompting ability into consistent team output. Your best marketer's judgment and process, codified and repeatable.

## 03

### FLOW

Your automations — workflows that connect your tools and run without someone manually kicking them off each time. This is where the hours come back.

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

## CONTENTS

# What's Inside

This guide builds directly on the Foundation you set up in Part 1. Every section introduces a mechanism your team can put into practice today.

## PART ONE · FUNCTION

- Projects: The Knowledge Hub
- Skills: The Process Layer
- Artifacts: The Output Layer

## PART TWO · THE SIX SKILLS

- Skill 01 · The Brand Steward
- Skill 02 · The Content Engine
- Skill 03 · The Email Campaign Planner
- Skill 04 · The Performance Analyst
- Skill 05 · The Nurture Architect
- Skill 06 · The Deck Builder

## PART THREE · INFRASTRUCTURE

- Building and Governing the System

PART ONE

# Function

## PROJECTS

# The Knowledge Hub

Part 1 covered how to set up a Project. Now we'll talk about how to scale Projects across your team.

As a quick refresher: a Project is a shared knowledge hub that hosts custom instructions and source material. Load it with your campaign brief, brand guidelines, ICP and messaging hierarchy and every conversation your team opens inside it draws from that material automatically.

For teams on Team or Enterprise plans, Projects are shared workspaces. You control who can view and who can edit. Members see the same knowledge base and work from the same context, which is where team-wide consistency starts to compound.

### PRO TIP

Claude uses filenames to retrieve the information so "Q1-2026-Campaign-Brief.pdf" is more useful than "brief.pdf." When asking Claude a question inside a Project, reference the document by name.

## WHAT TO LOAD INTO EACH PROJECT

- ✓ Campaign brief or quarterly marketing plan
- ✓ Brand voice and tone guidelines (concise version)
- ✓ ICP definition and primary audience documentation
- ✓ Approved messaging hierarchy and key claims
- ✓ Competitor positioning summary relevant to this campaign
- ✓ System prompt: the team's role, standards and what good output looks like

*Keep Project documents tight and current. A focused 10-page voice guide produces more consistent output than a 200-page brand bible. Load what Claude needs for the project, update it when the campaign changes and retire documents that no longer apply.*

## PROJECTS VS SKILLS

Once you have both running, the question you will hit is: when do I use a Project and when do I use a Skill? They are complementary, and understanding the difference is what makes the system work.

A Project holds the reference material Claude needs to understand your work. A Skill holds the process Claude follows to execute it. The Project provides the what, while the Skill provides the how.

As an example, your Brand Steward Skill runs better inside a Project loaded with your brand guidelines, because the Skill tells Claude how to review copy and the Project tells Claude what your brand says.

	PROJECTS	SKILLS
<b>Purpose</b>	Store knowledge Claude references	Define processes Claude executes
<b>Best for</b>	Long-term context, reference materials, team collaboration	Repeatable workflows, multi-step tasks, consistent methodology
<b>Example</b>	Campaign hub loaded with brief, ICP and messaging hierarchy	Brand voice review, campaign brief builder, performance reporting

**SKILLS**

# The Process Layer

A Skill is a folder of instructions, scripts and resources that Claude loads to complete a specific task. You write the logic once and every time that task comes up, Claude runs it the same way.

Claude comes with a set of built-in Skills that handle common document creation tasks like Excel spreadsheets, PowerPoint presentations, Word documents and PDFs. These run automatically when relevant. You don't need to configure them.

The more valuable capability for your team is Custom Skills.

These are Skills you build to codify your own workflows: a brand voice review process, a quarterly campaign reporting methodology, a brief structure your team uses every time. Once built, Claude applies that logic consistently across the team.

## HOW TO BUILD A CUSTOM SKILL

The easiest way to build a Skill is through a conversation with Claude.

Tell Claude what you want to create. Something like: *"I want to build a Skill that applies our brand guidelines to any piece of copy"* or *"I need a Skill that structures a campaign brief the way our team does it."*

Claude will ask you questions about the workflow, what good output looks like and what to avoid. Upload any reference materials you have, including brand guidelines, templates, or examples of work you are proud of.

Claude builds the Skill file from that conversation.

Once saved, your Custom Skill appears in your Skills list alongside the built-in Skills. From that point, Claude invokes it automatically when you work on a relevant task. You can edit and improve it at any time by asking Claude to update it.

**To find your Skills:** Side Bar Nav > Customize > Skills

**SKILLS**

# The Anatomy of a Good Skill

A Skill is a saved instruction set that tells Claude how to do a specific job. You write it once. Every team member who triggers it gets the same quality of output, regardless of how much they know about prompting.

Four components make a Skill work reliably. Leave any of them out and the output will vary.

**01 · ROLE**

Tell Claude who it is before it starts. The more specific the role, the more calibrated the output. “You are a senior B2B content strategist” produces different output than “You are a marketing assistant.”

**02 · RULES**

State what Claude can and cannot do. Include the constraints that matter: tone requirements, length limits, what to avoid, what must always appear. Exclusions are as important as instructions.

**03 · FORMAT**

Specify the output structure. A numbered list, a two-paragraph summary, a table with four columns. If you leave format to Claude, you will get a different layout every time.

**04 · OUTPUT EXAMPLE**

Include one example of what good output looks like. A single strong example does more to calibrate Claude than a paragraph of instructions.

**A SKILL IN PRACTICE**

Here is what all four components look like assembled for a content repurposing task:

**EXAMPLE SKILL**

```
You are a senior content strategist specialising in B2B SaaS marketing.
[ROLE]When given a long-form piece of content, your job is to repurpose
it into three channel-specific formats: a 150-word LinkedIn post, a
60-word email introduction and a three-bullet executive summary.
[RULES]Return the three outputs as clearly labelled sections. Do not
add commentary or explain your choices. [FORMAT]Example output:LINKEDIN
POST: [150-word post in active, direct voice]EMAIL INTRO: [60-word
opening paragraph, no subject line]EXEC SUMMARY: [Three bullets, each
under 20 words] [OUTPUT EXAMPLE]
```

**ARTIFACTS**

# The Output Layer

An Artifact is an interactive, shareable output Claude builds inside a conversation.

For marketing teams, this opens up a category of assets including self-assessments your prospects fill out, quizzes you embed in a campaign, reporting dashboards your leadership team can interact with.

<b>OUTPUT TYPE</b>	<b>WHAT MARKETERS USE IT FOR</b>
Documents & reports	Campaign briefs, performance summaries, board-ready narratives
Interactive tools	Lead generation quizzes, self-assessments, diagnostic calculators
Dashboards	Campaign performance, pipeline metrics, competitive summaries
Landing pages	Campaign pages, event registrations, lead capture forms, interactive demos
Diagrams	Customer journey maps, campaign flow logic, nurture path visualisations

**SHARING AND PUBLISHING**

Once Claude generates an Artifact, you have three options. Download or copy it for use elsewhere. Share it internally with colleagues on a Team or Enterprise plan, where it stays within your organisation and requires authentication to access. Publish it publicly, which makes it accessible to anyone with the link without requiring a Claude account. Published Artifacts are not indexed by search engines.

If Claude produces output in the chat window and you wanted an Artifact, ask: "Create this as an Artifact." It will rebuild it in the dedicated window.

PART TWO

# The Six Skills

**SKILL 01**

# The Brand Steward

This Skill gives Claude the context to evaluate and generate copy against your brand standards, applied consistently across any task.

*Phase 1 · Review Against Brand*

**PROMPT**

You are the brand guardian for our team. You have read and internalised the brand voice guidelines loaded into this Project. When I give you a piece of copy, evaluate it against those guidelines and do the following: (1) Identify any phrase, sentence or section that contradicts the brand voice – quote the original and explain the conflict. (2) Rate overall brand alignment on a scale of 1 to 5, with your rationale. (3) Rewrite the flagged sections in the correct brand voice. Do not change the content or the argument – only the expression.

*Phase 2 · Generate On-Brand Copy*

**FOLLOW-UP PROMPT**

Using the brand voice guidelines in this Project, write [copy type] for [audience] that communicates [key message]. The tone must match the guidelines exactly. Return one primary version and one alternative. For each, note the one brand voice principle it is most directly applying.

*Phase 3 · Turn this into a Skill*

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

**SKILL 02**

# The Content Engine

Give Claude a brief, a source article or a campaign asset and it produces channel-specific content variants across formats.

*Phase 1 · Generate*

**PROMPT**

You are a senior content strategist with deep experience in [B2B/B2C] marketing. Before producing anything, confirm: (1) What is the source content or brief? (2) Which formats are needed: blog post, LinkedIn post, email introduction, ad copy, short-form social, or a combination? (3) Who is the primary audience – role, industry, what they care about? (4) What is the one thing this content must make the reader feel or believe? Once confirmed, produce each requested format as a separate labelled section. Each piece must stand alone. Apply the brand voice loaded in this Project. Do not explain your choices or add commentary between outputs.

*Phase 2 · Refine by Channel*

**FOLLOW-UP PROMPT**

Take [format] and push it further. The current version is [too formal / too generic / too long]. Rewrite it for [platform] where the audience scrolls fast and stops for specificity. Keep the core claim. Cut anything that does not earn its place.

*Phase 3 · Turn this into a Skill*

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

**BEST USED FOR**

Campaign launches, content programs, channel expansion, agency briefs, social calendars

**SKILL 03**

# The Email Campaign Planner

This Skill gives Claude the context to plan, structure and audit email marketing campaigns before and between execution in a sending platform like HubSpot, Klaviyo or Marketo.

## Phase 1 · Plan the Campaign

**PROMPT**

You are a senior email marketing strategist. You understand campaign architecture, audience segmentation and the relationship between subject line, preview text, body copy and CTA at each stage of the funnel. I am going to give you: (1) The campaign goal and the audience segment it is targeting. (2) The number of sends and the cadence. (3) Any existing copy, briefs or previous campaign results I have. From this, build a campaign structure: email by email, with the job each send needs to do, the subject line angle to test, the body copy focus and the CTA. Flag any gaps in the brief before you start building. Do not invent information the brief does not support.

## Phase 2 · Analyze the Metrics

**FOLLOW-UP PROMPT**

I am going to share the performance data from the last send: open rate, click rate, unsubscribes and any reply data. Against the campaign plan we built, tell me: (1) What the data confirms about the audience's response to this message. (2) What the next send should change based on what you see. (3) Whether the campaign is on track to hit the stated goal. State your confidence level for each finding.

## Phase 3 · Turn this into a Skill

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

**SKILL 04**

# The Performance Analyst

Upload a campaign data export, a competitor research brief or a lead scoring dataset. Claude analyzes the numbers, identifies what the data shows and produces the analysis your team needs to make the next decision.

## *Phase 1 · Analyze*

**PROMPT**

You are a senior marketing analyst. I am uploading a data export. Read it and do the following: (1) Identify the top three findings by the primary KPI in the data. (2) Identify what is underperforming and state the most likely cause based on what the data shows. (3) Flag any anomalies worth investigating before the next campaign decision. State your confidence level for each finding. Note where the data is insufficient to draw a conclusion. Do not invent explanations the data does not support.

## *Phase 2 · Write the Narrative*

**FOLLOW-UP PROMPT**

Write a performance summary for a marketing director 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.

## *Phase 3 · Turn this into a Skill*

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

**SKILL 05**

# The Nurture Architect

This Skill gives Claude the context to design B2B nurture paths from the ground up including, stage-by-stage messaging, branching logic and the handoff criteria that tell your sales team when a lead is ready.

## *Phase 1 · Map the Path*

**PROMPT**

You are a senior demand generation strategist with deep experience in B2B sales cycles. Before building anything, confirm: (1) Who is the audience – role, industry, company size, where they typically enter the funnel? (2) What is the sales cycle length and how many stakeholders are typically involved in the decision? (3) What does a qualified lead look like to your sales team – what behaviour or intent signals trigger handoff? Once confirmed, design the nurture path stage by stage: the job each stage needs to do, the message angle, the content type and format, the trigger to move to the next stage and the exit criteria that indicate the lead has gone cold. Flag any gaps in the information I have given you before building.

## *Phase 2 · Pressure-Test the Logic*

**FOLLOW-UP PROMPT**

Review the nurture path we built against the audience profile. Tell me: (1) Where the messaging assumes knowledge the audience may not have at that stage. (2) Where the branching logic creates a dead end for a lead who does not take the expected action. (3) One change that would most improve conversion between [stage] and [stage], based on what the data or brief shows.

## *Phase 3 · Turn this into a Skill*

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

**SKILL 06**

# The Deck Builder

Give Claude a brief and it produces a structured, presentation-ready PowerPoint deck. Slide by slide, with headlines, body copy, speaker notes and a logical narrative arc built from your brief.

*Phase 1 · Structure the Deck*

**PROMPT**

You are a senior communications strategist who specialises in building executive presentations. Before producing anything, confirm: (1) What is the purpose of this deck – internal strategy review, external pitch, campaign report, leadership update? (2) Who is the audience and what decision are they making after seeing this presentation? (3) How many slides and what is the time available to present? Once confirmed, produce a slide-by-slide structure: slide number, headline, the one thing this slide needs the audience to understand, and the supporting point or data that proves it. Flag any gaps in the brief before building.

*Phase 2 · Build the Deck*

**FOLLOW-UP PROMPT**

Using the structure we built, write the full deck. For each slide: a headline (under 10 words, active voice), body copy (three points maximum, two lines each), and speaker notes (two to three sentences the presenter can read conversationally). Apply the brand voice loaded in this Project.

*Phase 3 · Turn this into a Skill*

**FOLLOW-UP PROMPT**

Based on everything we just worked through, build this into a reusable Skill. The Skill should run this same process every time it's triggered, in this format, for this audience. Generate the Skill file.

PART THREE

# Infrastructure

**GOVERNANCE**

# Building and Governing the System

Before you roll this out to your team, you need to make four decisions:

**DECISION 1 · WHO OWNS PROJECT CONFIGURATION**

One person should be responsible for setting up and maintaining each team Project. They load the documents, system prompt and define the review cadence. Treat it the way you would treat ownership of your brand guidelines.

**DECISION 2 · WHO BUILDS AND APPROVES SKILLS**

Skills codify judgment. A poorly built Skill produces consistently wrong output at scale, which is a worse outcome than inconsistent output from ad hoc prompting. A practical starting point: one or two people build and test Skills before the team uses them.

**DECISION 3 · HOW YOU EVALUATE EXTERNAL SKILLS**

If your team imports Skills from external repositories or shared libraries, treat each one as an instruction set you are responsible for, regardless of who wrote it. Before loading any external Skill, the person responsible for your Skills library should read it in full, test it against your brand standards and confirm it does not include directives that conflict with your policies.

**DECISION 4 · HOW YOU TRACK CREDIT CONSUMPTION**

Claude usage scales with team size and task complexity. Assign someone to review consumption monthly. Set a threshold that triggers a review before you hit your limit. Cowork sessions consume credits at a higher rate than browser sessions because they run longer context windows. Factor this in when planning team rollout.

- ✓ Named owner for each Project with a defined review cadence
- ✓ Defined process for building, testing and retiring Skills
- ✓ Evaluation criteria for any Skill imported from an external source
- ✓ Monthly credit consumption review with a threshold that triggers action
- ✓ Human review before any AI-generated output leaves the team

## WHAT'S NEXT

# Build the Flow

This guide gives you the Function layer and shows you how Projects, Skills and Artifacts work together.

Part 3 of the 3F Model covers Flow: the automations that connect your tools and run autonomously. The Skills you built in this guide become the inputs to workflows that execute on a trigger, a schedule or an event.

## LIVE WORKSHOP

The next step is building these workflows live. The May 26 workshop covers two complete systems in two hours, with working outputs your team can run independently. Learn more at [Maven](#).