

TEAM400

Modules 4-6

Claude AI - Applied Skills

Practical Usage of Claude AI and Basic Features.

STAGE TWO

Applied Skills

- Draft professional content with persona, writing & email prompts
- Create & iterate on Artifacts
- Apply Custom Styles to match your writing voice
- Build a Project with custom instructions & knowledge base
- Analyse data & use the Excel/PowerPoint Office integration

STAGE TWO

Applied Skills



Draft Content

Professional content with persona, writing & email prompts



Create Artifacts

Create & iterate on rich, interactive Artifacts



Custom Styles

Match your unique writing voice with personalised styles



Build Projects

Custom instructions & knowledge base for any project



Analyse Data

Excel & PowerPoint Office integration for data analysis

Deep Research

20 minutes | Demo + Q&A

Research deep dive on auto-pilot

What it does

Claude searches the web autonomously, reads multiple sources, follows leads, and compiles a structured report, all in one request. It takes a few minutes, not seconds.

Best for

- Competitive landscape analysis
- Market research & trend reports
- Technical deep-dives on unfamiliar topics
- Vendor or tool evaluations with cited sources

EXAMPLE PROMPT

“Research the top five AI agent platforms for mid-market companies in Australia. Compare pricing, features, customer reviews, and implementation timelines. Cite your sources.”

1 Demo - Claude's own knowledge vs Web Search

PROMPT, PASTE INTO CLAUDE

Context: We're a 25-person engineering company evaluating CRM platforms. Sales team will start at 3–5 users and grow to 10–15 over two years. Pain points: fragmented contact data, no pipeline visibility, weak integration with our engineering tools (Slack, GitHub, Linear). Budget-conscious but value-driven.

Role: Act as a senior SaaS analyst with deep experience advising small-to-mid engineering services firms on CRM selection.

Action: Compare Salesforce, HubSpot, and Pipedrive for our use case. Score each 1–10 on cost, ease of use, integration, reporting, and scalability. Apply weights (cost 20%, ease 25%, integration 20%, reporting 15%, scalability 20%), calculate weighted totals, and rank them. Then generate a visual decision matrix diagram showing the full scoring. Give me a clear recommendation with reasoning specific to a 25-person engineering company, not generic advice.

Format: Summary written analysis first (2–3 sentence justification per score, ranked recommendation, weight-sensitivity flags). Then a decision matrix diagram: vendors as columns, criteria as rows, cells colour-shaded by score (red → amber → green), weight column on the left, weighted total row at the bottom, rank row with the winner visually highlighted. Clean visual hierarchy, the winner should be obvious at a glance.

Target: A confident, visually scannable recommendation I can take straight into a leadership meeting.

2 Deep Research to Q&A

PROMPT, USE WITH DEEP RESEARCH MODE

Context: We're a 25-person engineering company evaluating CRMs. Initial deployment: 3–5 sales/BD users, scaling to 10–15 within 24 months. We need accurate, current pricing and feature data for Salesforce, HubSpot, and Pipedrive, not approximations from training data. Existing stack includes Slack, GitHub, Linear, Xero, Google Workspace.

Role: Act as a senior SaaS analyst conducting primary research on current CRM market offerings, pulling from vendor pricing pages, recent independent reviews (G2, Capterra, TrustRadius), and 2025–2026 comparison analyses.

Action: Research each of Salesforce, HubSpot, and Pipedrive across the web. For each vendor, gather: current pricing tiers and required add-ons for our use case, total cost of ownership at 5 and 15 users, native integrations with our stack, API quality and extensibility, real user feedback on ease of use and admin overhead, reporting capabilities, and scalability ceilings. Then score each 1–10 on cost, ease of use, integration, reporting, and scalability, with sourced justification per score. Apply weights (cost 20%, ease 25%, integration 20%, reporting 15%, scalability 20%), calculate weighted totals, and produce a ranked recommendation tailored to a 25-person engineering company.

Format: Executive summary up top with the ranked recommendation. Then a comparison table. Then per-vendor deep-dives (pricing, strengths, weaknesses, fit for engineering firms). Cite sources inline for every claim. Flag any score where evidence is thin or contested.

Target: A defensible, citation-backed evaluation document I can share with leadership and finance. Surface anything counterintuitive, if HubSpot's "free tier" hides costs, or Salesforce is cheaper than expected at our scale, say so. Identify the weight-sensitive criteria where my team's priorities could flip the ranking.

PROMPT, GENERATES AN INTERACTIVE ARTIFACT

Based on this research build an interactive decision matrix as a React Artifact

Format: Single-file React component, Tailwind styled, responsive. Use this exact layout: a grid with vendors as columns and criteria as rows, each cell shows the editable 1–10 score colour-shaded by score (red → amber → green), a weight column on the left with sliders, a weighted total row at the bottom, a rank row with the winner visually highlighted (border, badge, or fill). Clean visual hierarchy, the winner should be obvious at a glance. Brief tooltip or info icon next to each criterion explaining what it covers.

Target: A tool that turns a static recommendation into a live conversation. Layout should match the static diagram from Prompt 1 so the interactive version feels like the same artifact, just unlocked. Prioritise clarity and responsiveness over visual polish.

Demo - Exercise create & iterate

A

Try Deep Research

Do a deep research task to see the results that you get.

Skills

Why They Matter for Automation

Skills Basics

What is a Skill?

- A re-useable set of instructions that AI can follow, first adopted by Claude but used by many now.
- Turns multi-step workflows into one-click automations
- Invoked via slash commands (e.g. /meeting-notes)

Why Skills matter

- Better Context Management – Progressive Disclosure
- Consistency - same quality output every time
- Speed - no re-explaining context each conversation
- Shareability - distribute best practices across your team

Examples of types of skills

Document & Asset Creation

Create consistent, high-quality output every time: documents, presentations, reports, code, and designs.

Examples

- frontend-design skill
- Document generation (docx, pptx, xlsx)
- Embedded style guides & templates

Workflow Automation

Multi-step processes that follow a consistent methodology with built-in validation at each stage.

Examples

- skill-creator (builds new skills)
- Sprint planning & task creation
- Iterative review & improvement loops

MCP Enhancement

Workflow guidance that enhances your connected tools. Teaches Claude how to use your integrations effectively.

Examples

- Sentry code-review skill
- Jira/Linear project management
- Cross-service coordination (Figma → Linear → Slack)

Styling

Make every output look and sound like you — your brand and voice applied automatically.

Examples

- Adding your logo to documents
- Your writing style & tone of voice
- Avoiding generic “AI slop” phrasing

Build with skill-creator

How to create a skill in minutes

- 1. Describe your workflow - tell Claude what you want automated in plain language
- 2. Claude drafts the skill - generates a SKILL.md with trigger phrases, steps, and structure
- 3. Test with /skill-name - try it on a real task and review the output
- 4. Refine - bring back edge cases and ask skill-creator to improve handling

"Use the skill-creator skill to help me build a skill for [your use case]"

Writing a good description

The description is how Claude decides whether to load your skill. Always include:

- **What** it does (the outcome)
- **When** to use it (trigger phrases)

✗ "Helps with projects"

✓ "Manages Linear sprint planning and task creation. Use when user mentions sprint, tasks, or project planning."

When things go wrong

✗ Skill doesn't trigger

You type a request and the skill is ignored. Claude responds generically.

✓ Fix: improve the description

- Add more trigger phrases to the "Use when" section
- Or use /skill-name to invoke it directly via slash command

✗ Triggers on wrong things

Claude uses your skill for unrelated requests, producing odd results.

✓ Fix: narrow the description

- Make "Use when" more specific with concrete scenarios
- Add "Do NOT use when..." to exclude common false matches

✗ Not following instructions

The skill fires but skips steps, gives wrong format, or ignores key rules.

✓ Fix: add examples & constraints

- Show a before/after example of the output you want
- Break complex steps into numbered sub-steps with "Done when:" checks

Getting & sharing skills

Install a skill yourself

- Open a Project → Settings → Upload the .md skill file
- It appears immediately in the slash-command menu

Share across your organisation

- Admins can deploy skills org-wide
- Every team member gets the same skill automatically (if set)

Where to find skills

- Anthropic's built-in skills library (growing monthly)
- Third-party integrations (skills.sh, <https://clawhub.ai/skills>)
- Your own team - ask skill-creator to build what you need

Demo – Using and Creating Skills

Skills Demo

Using and Creating Skills

Use and create a skill. Understand progressive disclosure.

04

Artifacts

30 minutes | Live Demo + Practice

Artifacts your document workshop

What are Artifacts?

Claude's side panel where it creates self-contained outputs, documents, code, interactive tools, and diagrams. Think of it as Claude's workbench.

Key benefits

- Version history, every iteration is saved
- Iterate in place: "Make the timeline more aggressive"
- Download, share, or copy the output directly
- Creates documents, spreadsheets, interactive tools & dashboards

LIVE DEMO

"Create a project brief for launching a new customer loyalty program. Include objectives, target audience, timeline, budget considerations, and success metrics. Format as a professional document."

Demo Artifacts

A

Build an Artifact

Ask Claude to create an interactive tool relevant to your work, a calculator, planner, tracker, or dashboard. Iterate to add a chart or new feature.

FAQ: What do I actually need artifacts for?

Projects Knowledge Bases

30 minutes | Demo + Group Build

What are Projects?

01

Custom Instructions

Standing orders for every conversation. Define Claude's role, rules, constraints, and preferences once.

02

Knowledge Base

Upload files Claude references in every chat, brand guides, product docs, policies, templates, past examples.

03

Co-Work Project

New types of projects that can access files systems and local folders.

The personalisation stack

Individual Messages Your specific prompt. Overrides everything above.

Styles Voice and formatting. Set per-project or per-chat.

Project Instructions Standing orders for all chats within that project.

Profile Preferences Name, role, general prefs. Applies everywhere.

← HIGHEST PRIORITY

Demo & Exercise build your own Project

1. **Create a new Project** Name it after a real workflow you do weekly (e.g., “Weekly Report Review”)
2. **Add Custom Instructions** Write 3–5 rules Claude should always follow for this workflow
3. **Upload knowledge** Add 1–2 reference documents to the knowledge base (templates, brand guides, policies)
4. **Set a default Style** Choose a built-in style or create a custom one that matches your voice
5. **Test it** Start a conversation and see if Claude responds the way you need

Data Analysis & Office Integration

20 minutes | Demo + Practice

Data analysis in Claude

Upload & Analyse

- Upload CSVs, Excel files, PDFs, or images
- Claude reads, summarises, and finds patterns
- Interactive charts & visualisations via Artifacts

Best practices

- Tell Claude what to look for: “Trend the last 6 months”
- Ask for summaries first, then drill into details
- Always double-check numbers, Claude can miscalculate on edge cases

LIVE DEMO

“Here’s our Q1 sales data [upload CSV]. Summarise the top-performing products and identify any month-over-month trends. Then create an Artifact with an interactive chart I can share with the team.”

Office integration Excel, PowerPoint & Word

EXCEL

- Build formulas and complex spreadsheets
- Analyse data and create charts inline
- Clean, transform, and format datasets
- Create dashboards and reports

POWERPOINT

- Generate presentations from scratch
- Redesign existing slides
- Create charts and data visualisations
- Multi-agent workflows with Excel

WORD

- Draft and edit documents
- Summarise and restructure content
- Format and style documents
- Multi-agent workflows with Excel

Demo - Exercise analyse your data

A

Analyse your own data

Upload a spreadsheet, report, or dataset from work. Ask Claude to:

- Summarise key findings
- Identify trends or outliers
- Create a chart Artifact you could share

B

Try the Office Add-in

Open Excel or PowerPoint with Claude loaded. Try a real task:

- Build a model or dashboard in Excel
- Create or redesign slides in PowerPoint
- See the multi-agent workflow in action

PROMPT

“I've built a new deck and I want to do the engineering calculations for it because it's 4 m by 4 m and I'm using bearers and joists. I want to know if the bearers are strong enough. One way I have three piers, the other way I only have two so there's a 4 m gap in some of the piers. I just want to figure out if it's going to sag or not. ”

07

Connectors & Ecosystem

20 minutes | Demo + Q&A

Connectors Claude meets your tools

What are Connectors?

MCP integrations that let Claude talk directly to your existing tools. Instead of copy-paste, Claude reads from and writes to your systems live.

Available now

- Google Drive, Notion, Asana, Jira, Linear
- Confluence, Slack, GitHub, GitLab
- Build your own via the open MCP standard

USE CASE

“Summarise the open tickets assigned to me in Linear this sprint, identify blockers, and draft a standup update I can post to Slack.”

Demo - Exercise create & iterate

Search for MCP

MCP

Find MCPs from the providers websites.

Add Connectors

Connectors

In Claude. Open the connectors area, find some that would be relevant to you and see if you can get those connectors connected.

The layer cake

Skill

Knowledge — how you do a task. A SKILL.md folder you write once.

Connector

A packaged plug-in to a common app - Outlook, Drive, Asana, Slack. Switch it on.

MCP

The open standard underneath - a live socket to ANY system, including your own.

Teach how, give reach

- Skills are knowledge; Connectors and MCP are plumbing
- Skills teach Claude how to do the job your way
- Connectors and MCP give it reach into your systems
- Don't switch on every connector - each one costs attention. Turn on what the job needs

What's next

Today you learned

- Artifacts, custom styles & brainstorming
- Projects & the personalisation stack
- Data analysis & Office integration
- Research, connectors & the Claude ecosystem
- Quick wins to try this week

UP NEXT

Advanced Claude

Solutions with Claude

- Advanced Claude Usage
- Tool use & computer use