

TEACHING CLAUDE HOW TO DO SOMETHING

How to build a Skill in Claude

Teach Claude the way Stratus works once, then never re-explain it. A practical guide for RevOps and sales teams, with three Stratus skills you can build this afternoon.

AUDIENCE Sales & ops staff	READ TIME About 6 minutes	PREREQUISITES Paid Claude plan with Code Execution (confirm Stratus's plan)
-------------------------------	------------------------------	--

01 What a Skill is

A **Skill** is a small folder, at minimum one file called `SKILL.md`, that packages a procedure Claude should follow for a specific kind of task. Think of it as a playbook you hand a sharp new hire: *"When you do X, here's exactly how we do it at Stratus."*

Claude reads the skill's name and description at the start of every conversation, then loads the full instructions **only when a task actually calls for it**. That means you can encode a lot of detail without slowing anything down. You've already used skills without knowing it: the ones that build Word docs, Excel models, and PowerPoint decks are pre-built skills working behind the scenes.

The two kinds worth knowing:

- **Pre-built skills.** Document creation and similar. Automatic, no setup.
- **Custom skills.** The ones you write to capture how Stratus does something: a scoring rubric, a handoff-doc format, our outbound voice.

NOTE

A skill teaches Claude a *procedure*. It doesn't give Claude *access* to a system; that's what connectors do (see the Connected Tools guide). Skills and connectors work together: the connector pulls the data, the skill says what to do with it.

02 Skill, Project, or just a prompt?

They overlap. Quick test:

Just prompt it

One-off, or you'll never do it again. Don't build anything.

Build a Skill

A *repeatable procedure* with a right way to do it: "score this deal on MEDDPICC," "write this in our outbound voice," "format a handoff doc." The trigger: *you've explained the same how-to more than twice.*

Build a Project

A body of work that needs the same *background knowledge* every time (the territory model, the ICP). Skills are the *how*; projects are the *what-you-need-to-know*. They pair well: a project can carry a skill.

03 Build your first Skill

A skill is just a folder with a `SKILL.md` inside. The file has two parts: **frontmatter** (name and description) and a **body** (the actual instructions). The description is the most important line you'll write. It's how Claude decides when to reach for the skill, so say both *what it does* and *when to use it*.

```

---
name: meddpicc-scorer
description: >
  Scores an open opportunity against the Stratus MEDDPICC rubric and
  flags gaps. Use whenever someone asks to qualify, score, or gut-check
  a deal, or pastes discovery notes or a call transcript.
---

# MEDDPICC Scorer

## Instructions
Score the deal 0-2 on each element: Metrics, Economic Buyer,
Decision Criteria, Decision Process, Paper Process, Identify Pain,
Champion, Competition.

- 0 = no evidence · 1 = partial · 2 = confirmed with a name/quote
- Never infer a score without evidence from the notes. If it's
  missing, score 0 and say so.

## Output
A short table (element / score / evidence), a total out of 16, the two
weakest elements, and the single next action to move the deal forward.
Deliver it as an artifact so the rep can drop it into Salesforce.

```

A complete, working SKILL.md. Frontmatter on top, instructions below.

To add it in Chat: go to **Settings** → **Features** and upload the skill as a `.zip`. From then on Claude uses it automatically whenever a matching task comes up.

In Cowork: skills travel inside **plugins**. A plugin bundles skills together with connectors and can be installed for a whole workflow.

TIP

You don't have to write SKILL.md by hand. Describe the procedure to Claude in Chat and ask it to draft the skill file **as an artifact**. Iterate on it in the side panel until it's right, then download the folder to upload. The artifact is your working draft.

GOTCHA

On claude.ai, custom skills are **per-user**. Each teammate uploads their own, and admins can't yet push them org-wide. For the whole team to share one skill, distribute the .zip (or a Cowork plugin) and have everyone add it. Version it somewhere central so people aren't running different copies.

04 Three Stratus skills to start from

Each card is a starting point. Edit the rubric, format, and voice to fit.

01

MEDDPICC Scorer

USE WHEN qualifying or gut-checking a deal, or pasting discovery notes.

ENCODES the Stratus 0-2 rubric and the "no evidence, no score" rule.

OUTPUT a scored artifact (table, total, next action) ready to paste into Salesforce.

02

Closed-Won Handoff

USE WHEN a deal closes and needs a clean sales-to-CS handoff.

ENCODES the post-sale handoff-doc format: scope, stakeholders, commitments made, risks, success criteria.

OUTPUT a formatted handoff doc as an artifact, consistent across every AE.

03

Stratus Outbound Voice

USE WHEN drafting or rewriting AE outbound and follow-ups.

ENCODES our tone, structure, length, and the phrases we do and don't use.

OUTPUT an on-brand draft, so [REDACTED] rewrite sound like the same company.

END OF GUIDE Build one skill this week. The moment you catch yourself explaining the same procedure twice, that's your next one. Questions: Ben Marshall, RevOps.