

GIVING CONTINUOUS CONTEXT TO CLAUDE

How to Set Up a Project in Claude

Give Claude the Stratus context it needs once, so every chat starts already up to speed. Three Stratus projects you can stand up this afternoon.

AUDIENCE

Sales & ops staff

READ TIME

~6 minutes

PREREQUISITES

A paid Claude plan; sharing needs Team or Enterprise (confirm Stratus's plan)

01 What a Project is

A **Project** is a dedicated workspace that remembers two things for every conversation inside it:

Project knowledge

The documents and reference material you add: the ICP guide, the territory model, an account's history. Claude looks things up here automatically.

Custom instructions

Standing guidance for how Claude should behave in this project: tone, format, rules, what to never do.

Everything you chat about *inside* the project inherits that context. Instead of re-pasting the ICP or re-explaining the six-leaf model every time, you set it up once and every chat begins informed. Your related chats also stay grouped in one place instead of scattered across your history.

NOTE A project carries *what Claude needs to know*. A skill carries *how to do a task*. They stack: a project can include a skill, so a chat lands with both the background **and** the procedure ready. Projects live in Chat, and Cowork can draw on the same projects and artifacts.

02 Project, Skill, or just upload a file?

Just upload a file

You need Claude to read one document for one conversation. Drag it in; no project needed.

Build a Skill

There's a repeatable *procedure* with a right way to do it (see the Skills guide).

Set up a Project

A *body of work* needs the same *background* every time: an account you're working for months, the ICP every prospecting chat should respect, the territory rules every ownership question depends on.

03 Set up your first Project

Create the project, then fill the two slots: knowledge and instructions.

- 1 Create it.** In Chat, open **Projects** → **New project**. Name it for the body of work ("ICP & Prospecting," not "misc").
- 2 Add knowledge.** Upload or link the reference material Claude should always have on hand: guides, exports, prior briefs, the relevant Confluence pages.
- 3 Write custom instructions.** Tell Claude how to operate in this project every time. Keep it tight.
- 4 Work in it.** Start chats from inside the project. Each one arrives already knowing the context.

EXAMPLE • CUSTOM INSTRUCTIONS FOR A PROSPECTING PROJECT

Role:

You support Stratus AEs qualifying accounts against our ICP.

Always:

- Apply the Stratus ICP and the 2-of-4 Enterprise segmentation rule from the project knowledge. Never loosen the criteria to force a fit.
- When an account qualifies, state which 2+ criteria it meets, with evidence. When it doesn't, say so plainly and why.
- Default output: a short qualification summary as an artifact the rep can attach to the Salesforce account.

Never:

- Invent firmographics. If ZoomInfo/Salesforce data is missing, flag the gap.

TIP Projects are where **artifacts** compound. Build a battlecard or brief once, keep it in the project, and refine it across chats instead of starting from scratch. Pin your best version as project knowledge so future chats build on the good one, not a stale copy.

GOTCHA Project knowledge is **retrieval-based**: Claude pulls the relevant pieces, it doesn't memorize everything. Keep it curated. A tidy project of current, high-signal docs beats a dumping ground of outdated exports; stale content pulls answers off. And when you share a project on Team/Enterprise, everyone sees the knowledge and instructions, so don't load anything you wouldn't want the whole team reading.

04 Three Stratus projects to start from

Each card is a starting point. Swap in your own accounts, docs, and rules.



01 Territory Model

Holds the Confluence territory pages, the regional mapping standard, the six-leaf AE assignment and national-account overrides.

So that any ownership question ("who owns this account?") is answered against the real rules, not a guess.



02 ICP & Prospecting

Holds the Prospecting & ICP Qualification Guide and the 2-of-4 Enterprise rule.

So that every qualification chat scores accounts the same way, and produces a consistent summary artifact for Salesforce.



03 Account War Room

Holds everything on one strategic account: battlecard, call summaries, key emails, stakeholder map, open commitments.

So that every chat about that account is instantly current, and the deal artifacts stay in one place through close.

END OF GUIDE

Stand up one project this week. Start with the body of work you re-explain most. Questions: Ben Marshall, RevOps.

