

STRATOSPHERE LEARNING SERIES • AUGUST 2026

Three ways Claude can streamline work you repeat

Claude Design for on-brand assets, skills for work you repeat, and scheduled tasks that run without you.

BEN MARSHALL • GTM OPERATIONS

What we'll cover.

ONE · DESIGN

On-brand assets

Claude Design applies our brand system automatically, so internal one-pagers and decks don't need a designer for the first draft.

TWO · SKILLS

Work you repeat, not on a schedule

A skill records how you do a task once. Claude then applies it whenever the task comes up, without you re-explaining it.

THREE · SCHEDULED TASKS

Work that runs on a schedule

A scheduled task runs at a set time and leaves the output waiting for you. Our sales brief works this way.

THE MIDDLE SECTION IS HANDS-ON – YOU'LL BUILD SOMETHING

01

Design

How to make on-brand assets in Claude Design, and how to work on them with a colleague.

An example: a guide to Claude Design

It was described in plain language, not laid out by hand. Our brand system is loaded into Claude Design, so the navy, the type, and the spacing came out correct without anyone choosing them.

STRATUS GTM BRAND SYSTEM · ORGANIZATION DEFAULT

stratus

INTERNAL GUIDE · CLAUDE DESIGN

How we design together

Four steps, in this order. The order matters.

The Stratus design system is already set up for you.

1

Start from what you already have

Brainstorming in normal Claude is a great place to start. A written prompt works too. So does a Word doc, a slide deck, a spreadsheet, screenshots, or pointing Claude at our codebase.

Five steps, in this order.

01 The design system (already set up)

Set up once from our brand assets. Every project after that already uses Stratus navy, Lato, and our components — automatically.

02 Start from what you already have

A prompt, a Word doc, a deck, a spreadsheet, screenshots, or our own site.

03 Share at the level the work needs

Private, view-only across the org, or edit access — where colleagues can change the design and talk to Claude in the same conversation as you.

04 Give feedback where the problem is

Comment on the element that's wrong. Fix one instance, then apply it across the whole design.

05 Export it

Internal link, PDF, PPTX, or standalone HTML.

OPEN CLAUDE DESIGN →

02

Skills

A skill is a written record of how you do a task. Claude reads it and applies it when the task comes up. We'll build one from scratch.

You already have a process. It just isn't written out and intuitively handled by Claude.

Most repeated work involves re-explaining the same format, pasting the same context, or re-describing what a good result looks like. A skill holds all three.

WITHOUT A SKILL

Explain it, correct the output, repeat next week

WITH A SKILL

Ask for the work and get your format

Written once, then edited whenever you spot something wrong.

What a skill needs to know.

Five things determine whether a skill gets used or sits idle. Getting all five out of your head is what the prompt on the next slide is for.

When would you use it	Decides whether Claude ever reaches for it on its own. Most-skipped, most important.
What you'll hand over	Messy bullets? A file? A transcript? Say so, and it stops guessing.
What comes back	Format, length, and where it's going. "Slack, under 150 words" beats "a summary."
What good looks like	One real example you were happy with. This does more work than any instruction.
What it must never do	Your banned words, your hard rules. Never invent a name or a date — ask.

When creating a skill, have Claude interview you first.



DON'T START HERE

Write me a skill for my weekly update.

Claude has to guess your sections, your length, and your tone. You end up editing the output every week, which is the thing you were trying to stop doing.



START HERE INSTEAD

I need to do X.

COPY

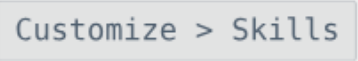
Before you write anything, interview me. Ask three questions at a time, wait for my answers, and keep going until you know:

- when I'd use this and what I'd say to trigger it
- what I'll hand you each time
- what you should give back – format, length, where it goes
- what good looks like (ask me for a real example)
- the rules, including what you should never do

When you have enough, tell me. Then draft the skill and run it on my example so we can see if it works.

Saving and sharing skills.

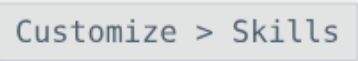
01 Save the one you just built

When Claude finishes writing the skill, click  in the chat. It lands in  with a toggle. Run it once more on a different input to check it generalizes.

02 Save one a colleague shared with you

It's already in your list under Shared with you, greyed out until you switch it on. If they sent you a zip file instead, add it with  →  → .

03 Share yours with the org

Open your skill in  and click  — either specific people or the whole organization. Shared skills are view-only, and when you improve yours everyone gets the update automatically.

04 Find what the org has already shared

Your list is split into Personal, Shared with you, and Organization. Organization skills are installed from the directory: open , click , and go to the  tab.

How Claude decides to use it.

YOU TYPE

"Here are my **bullets** from the week – write my **update**"

↓ Claude reads the description of every skill you have switched on, and looks for one that matches what you just asked for.

THE DESCRIPTION THAT MATCHES

"Turns raw weekly notes into a Friday status update – use when I paste **bullets** and ask for an **update** or a status"

You never name the skill. The overlap between your words and its use when clause is the whole mechanism — which is why that clause is the part worth writing carefully.

IF IT STILL DOESN'T GET PICKED UP, NAME IT DIRECTLY, THEN IMPROVE THE DESCRIPTION



Vague instructions leave nothing to match against

"Writes updates"



When you give it clear, specific instructions it has plenty to match against

"Turns raw weekly notes into a Friday status update – use when I paste **bullets** and ask for an **update**"

"Builds a pre-call research brief – use before a first call when I give a company **name**"

"Categorizes support tickets and drafts a first response – use when I paste a list of **tickets**"

"Cleans and dedupes an event attendee list – use when I upload a **registrant list**"

03

Putting them together

Two things we've built that combine skills, connected data, and a schedule. Both are running now.

A Project is a workspace that already has your context in it.

Every chat you start inside a Project begins with the same instructions and the same reference material, so you stop pasting background in each time.

Project knowledge	Documents, files, and notes Claude can read in every chat in the Project
Project instructions	How Claude should behave and respond, applied to every chat inside it
Its own chat history	Related conversations stay together instead of scattering across your sidebar
Sharing	On Team and Enterprise, give colleagues view or edit access to the whole workspace

ONE CATCH: CHATS IN A PROJECT CAN'T SEE EACH OTHER. ANYTHING THAT SHOULD PERSIST GOES IN PROJECT KNOWLEDGE

- 01

Create it

Click `Projects` in the sidebar, then `Create project`. Name it for the work, not the month.
- 02

Add the knowledge

Click `+` and upload the documents, files, or notes Claude should always have.
- 03

Write the instructions

Click `Set project instructions`, describe how Claude should work, and save.
- 04

Share it

Click `Share project` and pick Can view or Can edit per person.

Sales Command Center

(Claude Project)

A shared workspace that already holds our pipeline data, our qualification standard, and our formats — so reps don't brief it from scratch each morning and everyone gets the same output shape.

KNOWS

Live Salesforce state

Current pipeline, stage history, and ownership, read directly rather than exported.

APPLIES

Our qualification standard

MEDDPICC scored the same way by every rep, against the real fields.

FOLLOWS

A written constitution

Written rules for what it can assert and when it has to say it doesn't know.

PRODUCES

Briefs and battlecards

The same shape every time, so they're comparable across accounts.

OPEN CLAUDE PROJECTS →

A scheduled task runs on its own and leaves the output waiting.

You describe the job once and pick a cadence. It runs in the cloud, so your laptop can be shut and it still happens.

Runs in the cloud	No computer awake, no app open. Anything needing local files runs locally instead
Uses what you've set up	Your connectors, skills, and plugins — same as any other Cowork task
On a cadence or on demand	Recurring on a schedule, or triggered manually whenever you want it
Good candidates	Daily briefings, weekly reports, standup and status summaries

COWORK IS ON PAID PLANS AND STILL ROLLING OUT — CHECK WHETHER YOU HAVE IT BEFORE YOU PLAN AROUND IT

01 Open a Cowork task

Start a new one, or use a task you're already working in.

02 Type /schedule

Claude asks a few questions, usually with options to pick from, then confirms the cadence.

03 Manage it from the sidebar

Click Scheduled to see upcoming and past runs, edit the instructions or cadence, pause, or run it now.

A weekly brief for Sales leadership, on a schedule

This runs on a schedule with nobody triggering it. It reads the systems below and produces cohort activity, goal tracking, outreach volume, themes, and a day-by-day read.

OPEN THE BRIEF →

Salesforce	Opportunities, stage history, close-date movement
Rillet	ARR actuals and recognized revenue
Outreach	Rep activity and sequence engagement
Scratchpad	Call recordings and rep notes
	Meeting, call, and email activity

04

What to watch for

Everything shown here works now, but not on the first attempt. These are the failures worth knowing about before you rely on it.

Three things you'll run into.

01

It can pull the wrong records

It will query a system confidently and hand back a clean-looking answer built on the wrong rows. Nothing will look broken. Check the output against something you already know before you act on it.

02

More systems means more ways to break

A skill or scheduled task that reads from several systems has a failure point at every one of them. The more sources it touches, the more brittle it gets — expect to maintain it rather than set it and forget it.

03

It runs long unless you tell it not to

Claude is wordy by default. Put the limits in your instructions — a word cap, no preamble, phrases to avoid — or you'll be trimming every output by hand.

05

Your turn

Pick a task you repeat, run the prompt from the last slide, and answer the questions. We'll go through two of them together.

NEXT STEPS

What to do next

Pick one task you repeat and write a skill for it this week.

Use the interview prompt from earlier, then share the skill with one person who does the same job. If everyone here does that once, we end up with a shared library rather than one person's.

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If nothing comes to mind.

Pick one and type the line underneath it, followed by the interview prompt from earlier.

SALES

Account research before a first call

"I need to research an account before a first call and write up what actually matters."

CUSTOMER SUCCESS

Renewal risk summary from account activity

"I need to summarize renewal risk for an account from its recent activity."

SUPPORT

Ticket triage with a draft first response

"I need to triage a batch of support tickets and draft a first response for each."

PRODUCT

Customer request into a properly formed ticket

"I need to turn a customer request into a properly formed ticket."

ENGINEERING

Pull request description from the diff

"I need to write a pull request description from a diff."

MARKETING

Event list cleaned and deduped the same way twice

"I need to clean and dedupe an event attendee list into our format."

FINANCE

Month-end variance commentary in our format

"I need to write month-end variance commentary in our format."

EVERYONE

A weekly update on anything you own

"I need to write a weekly update on the projects I own."

"I need to write a weekly update on my pipeline for my manager."

"I need to write a weekly update on open tickets and what's blocked."

"I need to write a weekly update on what shipped and what slipped."

"I need to write a weekly update on my team's numbers."

THEN REMEMBER, PASTE THAT INTERVIEW PROMPT.

"I need to do X. Before you write anything, interview me – three questions at a time – until you know when I'd use it, what I'll hand you, what you should give back, what good looks like, and the rules. Then draft the skill and run it on my example."