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STEP-BY-STEP GUIDE

The Art of the Prompt

For Every Team, Every Workflow

ABOUT THIS GUIDE

A step-by-step walkthrough for writing effective AI prompts in your daily work. Use this alongside a training session or work through each page on your own. By the end, you will have built a real, production-ready prompt.

Symphony AI | Strategic AI Consulting

WHAT WE BUILD

Custom AI Agents

Production-ready agents built around your specific workflows, data, and team structure.

Workflow Automation

Orchestrate repeatable processes from intake to output. Measurable time savings from week one.

Hands-On Training

Your team learns to build, not just use. Skills-based sessions that compound over time.

No hype, no hallucinations, just systems that ship.

What Is a Prompt?

Think of it as a blueprint.

Vague directions get you filler. A detailed blueprint gets you precision.

A prompt is an instruction

1

Not a search query. Not a keyword. A full, specific instruction that tells Claude exactly who to be, what to do, and what format to return.

Clarity beats cleverness

2

You don't need fancy language. You need specific language. The more context you give, the more precise the output becomes.

It's a conversation

3

A bad first output doesn't mean start over. It means refine the prompt. Each iteration gets you closer. Claude remembers the full thread.

x VAGUE PROMPT

"Write me a summary of this report."

✓ SPECIFIC PROMPT

"As a senior analyst, write a 4-bullet executive summary of Q2 results..."

Role + Task + Context = Great Output

ROLE + **TASK** + **CONTEXT** = GREAT OUTPUT

ROLE Who Claude should be

Give Claude a specific identity with expertise. Not just a job title. The more precise the persona, the better the mindset Claude brings to the output.

"You are a Senior Financial Analyst with 10 years of experience reviewing quarterly earnings for mid-market SaaS companies."

TASK What you want done

State the exact action and the specific deliverable. Be explicit about format, length, and purpose. Claude performs best when it knows the exact output expected.

"Write a 4-bullet executive summary formatted for the Monday leadership meeting."

CONTEXT Everything Claude needs to know

Paste the real data. State the situation. Include any constraints, tone requirements, or audience notes. This is where most prompts fail. Don't make Claude guess.

"Here is the raw Q2 data: Revenue \$2.4M, up 18% QoQ. Churn at 4.1%..."

Build a Prompt from Scratch

We start with a weak prompt and upgrade it one element at a time using Role, Task, Context.

✗ WEAK PROMPT (BEFORE)

"Summarize these meeting notes."

No role. No data. No format.
Output is vague filler.

MEETING DATA

Client: Greenfield Partners
Topics: Timeline delay, scope change, budget
Decision: Extend 2 weeks, hold budget flat
Action items: 4 assigned across team

STEP 1: Add Role

"You are a Senior PM with 10 years of experience running client engagements."

Claude now has an expert identity.

STEP 2: Add Task

"Write a structured meeting recap with action items, formatted for the internal team Slack"

."
Claude knows the exact deliverable.

STEP 3: Add Context

"Here are the raw meeting notes from the Greenfield Partners call: [paste notes]"

Claude now has real data. Precise output.

✓ COMPLETE PROMPT (AFTER)

Role + Task + Context combined.

Result: Key Decisions, Action Items with Owners, Timeline Updates, Next Steps.

THE COMPLETE PROMPT: COPY AND USE THIS

You are a Senior Project Manager with 10 years of experience running client engagements. Here are the raw notes from the Greenfield Partners call on March 12: Sarah (PM), David (Eng Lead), and the Client VP discussed a timeline delay, scope change request, and budget impact. Decision: extend deadline 2 weeks, hold budget flat. 4 action items assigned. Write a structured meeting recap for the internal team Slack channel. Include: Key Decisions (2 sentences), Action Items (owner + deadline for each), Timeline Update, and Next Steps. Keep under 200 words. Professional but concise.

Iteration & Common Mistakes

WHEN THE OUTPUT ISN'T RIGHT: ITERATE, DON'T START OVER

Wrong format?

Add to your Context: "Always use exactly this structure: [paste ideal output]"

Too generic?

Tighten the Role: add specific expertise, e.g. "...with focus on enterprise SaaS renewals"

Missing a section?

Add it explicitly to the Task: "Include a section on..."

Too long / short?

Add a constraint to Context: "Keep total response between 150 and 200 words"

COMMON MISTAKES → THE FIX

Treating Claude like a search engine (2-3 word queries)

→

Write full Role + Task + Context instructions

Skipping the Role: jumping straight to the question

→

Always start with 'You are a...' to set Claude's mindset

Not providing the actual data: making Claude guess

→

Paste the real data directly into your Context every time

Accepting a bad first output and starting over

→

Iterate on the prompt: refine one element. Claude remembers.

Vague Task requests like 'write something good'

→

Specify exactly: bullets, 3 sections, under 200 words, memo format

Writing one giant paragraph with everything jumbled

→

Label clearly: Role: ... / Task: ... / Context: ...

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