

LOGO HERE

STEP-BY-STEP GUIDE

Building Your First Claude Skill

For Every Team, Every Workflow

ABOUT THIS GUIDE

A step-by-step guide to creating reusable Claude Skills for your daily workflow. Follow each step in sequence. By the end, you will have a working Skill you can use starting today.

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 Claude Skill?

A Claude Skill is a saved set of instructions that pre-loads Claude with the role, format, and rules it needs for a specific recurring task. Instead of re-explaining your context every time, a Skill makes Claude an always-ready specialist.

ONE-OFF PROMPT

The Temp

- Re-explain context every time
- Output format varies wildly
- No memory of preferences
- Works for anything, optimized for nothing

CLAUDE SKILL

The Specialist

- ✓ Briefed once. Remembers forever.
- ✓ Same structure every single run
- ✓ Holds context, preferences, data
- ✓ Built once. Used forever.

BUILD A SKILL WHEN...

- You do the same task more than twice a week
- You always re-explain the same context to Claude
- You need consistent format every time (drafts, reports, emails)
- You want output quality to improve with each use

SKIP THE SKILL WHEN...

- ✗ One-off questions you will never ask again
- ✗ Quick lookups or simple factual questions
- ✗ Tasks where the format changes every time

Rule of thumb: If you do it more than twice a week, it deserves a Skill.

STEP 1

Define the Purpose

Before you write a single instruction, answer one question:

"What is the ONE repetitive task this Skill will handle?"

Be specific. One sentence. Test it: would a new hire know exactly what to do?

✗ TOO VAGUE

"Help me with emails"

"Make Claude better at writing"

"Write things for meetings"

✓ SHARP PURPOSE STATEMENTS

"Summarize any meeting notes into a 5-section recap for the

"Convert raw quarterly data into board-ready executive summa

"Review contracts and flag key clauses with risk ratings"

FOR THIS EXERCISE, WE WILL BUILD:

Meeting Recap Generator

Purpose: Summarize any meeting's raw notes into a standardized 5-section team recap.

ANATOMY OF A GOOD PURPOSE STATEMENT

Action verb: Summarize / Convert / Draft / Review / Flag

Input: raw meeting notes / quarterly numbers / email thread

Output: 5-section recap / ranked table / 3-bullet summary

Audience/Context: for the team Slack / in brand voice / per our contract standards

STEP 2

Write the Instructions

Your Skill instructions = a system prompt. They tell Claude who to be, what to return, and what rules to follow.

MEETING RECAP GENERATOR: COPY THIS INTO YOUR CLAUDE PROJECT

```
# ROLE
You are a Senior Project Manager at
a professional services firm. When given
raw meeting notes, respond with a clear,
structured recap using professional
business language only.

# FORMAT (return in this exact order)
MEETING OVERVIEW
[2 sentences: who, what, why]
KEY DECISIONS
* [Decision 1] * [Decision 2]
ACTION ITEMS
* [Owner]: [Task] by [Date]
OPEN QUESTIONS
* [Question 1] * [Question 2]
NEXT STEPS
[1 to 2 sentences: what happens next]

# RULES
Use only data provided. No speculation.
Keep total response under 250 words.
Professional business language only.
Never omit a section.
```

ROLE

Set Claude's identity with specific expertise. "Senior PM" gives it the mindset and standards to apply automatically.

FORMAT

The exact output structure Claude returns every time. No guessing, no variation. Label each section explicitly.

RULES

Hard constraints that prevent common failures: speculation, format drift, word bloat. Add a rule for every edge case.

ADAPT: Change Role → your role. Change Format → your structure.

WHERE TO PUT YOUR SKILL INSTRUCTIONS

METHOD 1: Claude Project (easiest)

Go to Claude.ai → Projects → New Project → Add Instructions. Paste your skill text.

METHOD 2: SKILL.md File (for Cowork users)

Create a file: `.claude/skills/meeting-recap/SKILL.md`. Place your instructions inside.

METHOD 3: Tell Claude directly (quick test)

"Read this skill before responding: [paste instructions]. Then process these notes: [

STEP 3

Test It & Iterate

TEST INPUT: PASTE THIS INTO YOUR SKILL NOW

Client: Greenfield Partners | Date: March 12, 2026
 Attendees: Sarah (PM), David (Eng Lead), Client VP of Operations
 Topics: Q2 timeline delay (2 weeks), scope change request for reporting module
 Budget: Client wants to hold flat despite scope increase
 Decisions: Extend deadline 2 weeks, defer reporting module to Phase 2
 Action items: Sarah to send revised timeline by Friday. David to scope Phase 2.
 Open: Staffing for Phase 2 TBD. QA timeline not yet confirmed.

BEFORE VS. AFTER: WHAT YOUR SKILL PRODUCES

WITHOUT A SKILL: Prompt: "Summarize these notes"

The meeting with Greenfield Partners was about some delays and scope changes. Sarah and David were there along with the client. They discussed timelines and budgets. Some action items were assigned. The team will follow up later.

No structure. No owners. No deadlines. Useless.

WITH YOUR SKILL: [paste data → skill does the rest]

MEETING OVERVIEW:

Greenfield Partners sync on Q2 timeline.

KEY DECISIONS:

- Extend deadline 2 weeks • Defer reporting to Ph2

ACTION ITEMS:

- Sarah: Revised timeline by Friday
- David: Scope Phase 2 by next week

OPEN: Phase 2 staffing | QA timeline

IF THE OUTPUT ISN'T RIGHT: ITERATE THE INSTRUCTIONS

Wrong format?

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

Too generic?

Tighten the Role: "Senior PM specializing in enterprise client engagemen

Missing a section?

Add it explicitly: "Always include a section titled OPEN QUESTIONS"

Too long?

Add to Rules: "Keep total response between 150 and 200 words strictly"

Wrong tone?

Add to Rules: "Use professional business language. Never use casual phra

A Skill is never "done." It gets better with every edge case you encode.

The first version you write today is v1.0. Plan to iterate once after your first real use.

SYMPHONY AI

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