

## AGENTS AND SKILLS STARTER

# Build your first *Claude* skill.

An AI agent is only as good as the training you give it. In Claude, that training is called a skill. This guide walks you through building your first one, step by step.

**A Claude account**

Skills work on every plan. Uploading your own needs Pro, Max, Team, or Enterprise.

**One repeat job**

Something you explain or do the same way every week.

**Your steps**

How you do that job today, even rough notes.

**You in charge**

The agent gets things ready. You make the call.

**FIRST, PICK THE JOB****GOOD FIRST JOBS****Meeting notes**

Summary, decisions, and next steps.

**First replies**

A draft answer to common questions.

**Weekly update**

Pull the week together for your team.

**Checklists**

Run the same review the same way.

**THEN BUILD IT IN CLAUDE**

1

**Turn on skills**

Go to Customize, then Skills. On Team or Enterprise, an owner turns skills on first.

2

**Write the training**

Fill in the template on page 2. Save it as SKILL.md.

3

**Zip the folder**

Put SKILL.md in a folder named for the job. Zip the folder.

4

**Upload it**

In Customize, then Skills, click +, Create skill, Upload a skill.

5

**Ask for the job**

Ask in plain words. Claude uses the skill when the job matches.

6

**Write lessons back in**

Fix what was off in the training. Upload the new version.



**Shortcut:** paste your rough steps into Claude and ask, *"Help me turn this into a skill."* It can draft the file with you. On a Mac with Pro, Max, or Team, Cowork can also record you doing the task and suggest a skill from it.

**WITHOUT A SKILL**

- You explain the job every time
- Results change from one day to the next
- You fix the same things again

**WITH A SKILL**

- You explain it once, in writing
- It's done the same way every time
- Each fix stays fixed

**IF IT DOESN'T GO RIGHT THE FIRST TIME****It didn't use my skill**

Make the description say exactly when to use it, in the words you'd actually type.

**It did the job its own way**

Add what you want to the Rules, or write it under Lessons learned.

**Can my team use it?**

On Team or Enterprise, an owner can add it for everyone in your organization.

## THE TRAINING TEMPLATE

# Write it like you'd *train a person*.

A skill is a plain text file named SKILL.md. The top two lines tell Claude what the skill is and when to use it. Everything below is the training.

## FILL IN THESE SIX PARTS

## THE TOP OF THE FILE

## 1 name

Short name for the job. Up to 64 characters.

meeting-notes

## 2 description

What it does and when to use it. Up to 200 characters. Claude reads this to decide when the skill fits.

Use when I share meeting notes. Write a summary, decisions, and next steps.

## 3 The job

One or two sentences on what done looks like.

A one-page recap the team can read in two minutes.

## THE TRAINING

## 1 Steps

The order you do it in, the way you'd show a new hire.

1. List decisions. 2. List next steps with owners. 3. Flag open questions.

## 2 Rules

What it must always do, and what it must never do.

Never guess a due date. Ask.

## 3 Lessons learned

Start empty. After each run, add what to do better.

9/28: keep names exactly as written.

## THE PRACTICE LOOP

1



## Run it

Ask for the job on real work.

2



## Check it

Read it like a manager would.

3



## Note the fix

What would you tell a new hire?

4



## Add it in

Put it under Lessons learned and re-upload.

## TIPS FOR GOOD TRAINING

✓ **Use plain words**, like you're talking to a new hire.

✓ **Show an example** of what good looks like.

✓ **Keep it short**. A page is plenty to start.

✓ **One job per skill**. Make a second skill for a second job.

✓ **Say what to do when unsure**: stop and ask.

✓ **Date your lessons** so you can see it improve.

## READY FOR MORE THAN ONE HELPER?



## Claude Code agents

A helper file with one job and only the tools you allow. It reports back when done.



## Copilot Agent Builder

A quick agent for you or a small team, grounded on your team's content.



## Copilot Studio

Agents for a whole department or company, with admin controls.

## PUT TOGETHER, IT LOOKS LIKE THIS

## MEETING-NOTES / SKILL.MD

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**name:** meeting-notes

**description:** Use when I share meeting notes. Write a summary, decisions, and next steps.

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**# The job:** a one-page recap the team can read in two minutes.

**# Steps:** 1. List decisions. 2. List next steps with an owner for each. 3. Flag open questions.

**# Rules:** Never guess a due date. Ask. Keep names exactly as written.

**# Lessons learned:** 9/28: put open questions at the top.

KEEP IT SAFE

# Give it only *what the job needs*.

You wouldn't give a new hire every key on day one. Treat agents the same way. Here's where your work is best protected, and the habits that keep it that way.

## WHERE YOUR WORK IS BEST PROTECTED

| SETUP                                           | WHAT PROTECTS YOU                                                                                                                   | BEST FOR                         |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| <b>Claude, personal plan (Free, Pro, Max)</b>   | You choose in your privacy settings whether your chats can help train future models. Check that setting.                            | Learning and personal work       |
| <b>Claude, business plan (Team, Enterprise)</b> | Not used to train models by default. Admins control who can create and share skills.                                                | Teams working in Claude          |
| <b>Microsoft 365 Copilot (work account)</b>     | Shows each person only what they already have permission to see. Not used to train models. Follows your labels and retention rules. | Teams that live in Microsoft 365 |

✓ **For a team, the strongest setup is a work account with admin controls**, not a personal account used for work.

## HABITS THAT KEEP IT SAFE

- ✓ **No passwords or keys** in a skill, ever.
- ✓ **Trusted skills only**. Read anyone else's skill before you add it.
- ✓ **Work data stays in work accounts**.
- ✓ **Least access**: only the files and tools the job needs.
- ✓ **A person approves** anything that leaves your organization.
- ✓ **Keep a list** of every agent, its job, and its access.

## BEFORE YOU CONNECT EMAIL, FILES, OR OTHER TOOLS

|                                                                                                                                                                     |                                                                                                                                                                             |                                                                                                                                                                                |                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p><b>What can it read?</b><br/>Only the folders and inboxes the job needs.</p> |  <p><b>What can it change?</b><br/>Start with read-only. Add more once you trust it.</p> |  <p><b>Who sees the results?</b><br/>Keep drafts private until a person approves them.</p> |  <p><b>How do I turn it off?</b><br/>Know where the off switch is before you start.</p> |
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## IF SOMETHING LOOKS WRONG

|                                                                                                                                                          |                                                                                                                                                                            |                                                                                                                                                                         |                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1</p>  <p><b>Stop it</b><br/>Turn the skill or tool off first.</p> | <p>2</p>  <p><b>Check what it touched</b><br/>Look at what it read, wrote, or sent.</p> | <p>3</p>  <p><b>Fix the training</b><br/>Add a rule so it doesn't happen again.</p> | <p>4</p>  <p><b>Tell the owner</b><br/>The person responsible for that agent.</p> |
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## WANT HELP WITH YOUR FIRST ONE?



### We'll build it with you

Bring the job you repeat most. We'll write the training together, set it up safely in your own accounts, and stay with you as it grows.



### Reach out

hello@2n2solutions.com, or send a message on LinkedIn. 2n2solutions.com