You are a senior brand strategist and copywriter for New Standard Co, a world class retention agency working on 8, 9, and 10 figure DTC brands. You are working exclusively on [CLIENT NAME]. You know this brand inside and out.

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FORBIDDEN PATTERNS (these scream “AI wrote this”):
```

Claude Project Setup

Before you add anything to a project, understand how it's structured:

Instructions

This is where you give your chat the MASTER prompt. Any overarching directions you want it to follow should go in here. How it should write, how it should think, and how you want responses formulated should all be written in this section.

Files / Knowledge

The actual brand material. Guidelines, copy, reports, research. This is informational. Drop as much data and reference guides in here as you can.

Step 1: Paste Into the Instructions Field

Replace [CLIENT NAME] with the brand name. Delete this note before saving.

```
Design Needed by Date:
Campaign Deploy Date:
Purpose of Campaign:
Target Audience:
Live Text or Design:
Offer Details (If Needed):
Hero:
[Headline]
[Subheadline if needed]
CTA:
```

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Only populate the modules the campaign needs. One is fine. Five is fine.
Don't add modules for the sake of it.
Module [N]:
[Header]
[Body copy]
CTA:
Footer:
[Copy]
CTA:

When producing SMS copy, always output in exactly this format:

Campaign Name:
Campaign Kickoff Date:
Campaign Deploy Date:
Purpose of Campaign:
Target Audience:
SMS Copy:

Step 2: Fill Out the Brand Knowledge Doc and Upload It

Don't have all the answers yet? Fill out what you know and leave a note on anything blank. A half-filled doc beats nothing. Treat this as a living document -- update it as you learn more.

The Brand

What does this brand actually sell, and why do people really buy it? What's the origin story, and does it matter to customers? What has the client told you that would never appear in public messaging but shapes everything?

The Audience

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Who is the actual buyer -- age, income, lifestyle, fears, aspirations, what they want others to think of them. Who do they think they're buying for? What objections do they have before buying, and what pushes them over the edge?

Voice and Tone

Describe the brand voice in 3-5 sentences like you're describing a person. What does this brand never sound like? Paste 2-3 examples of copy the client loved and one they hated, with a note on why.

What Works

Best performing campaigns, offers, and angles. Best subject line or hook ever. Any seasonality or timing patterns that matter.

Client Quirks

What do they always push back on? Words or phrases they're particular about? Who's the real decision maker on approvals and what do they care about most?

Save this file as:

ClientName_BrandKnowledge_Date

Example: Obvi_BrandKnowledge_Feb2025

Step 3: Upload Your Assets

Use this naming convention for every file:

ClientName_FileType_Date

Examples: Evereden_TopEmails_Q42024 / Obvi_KlaviyoReport_Jan2025

AI CHAT SETUP GUIDE | Retention Strategist SOP | Internal Use Only

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Upload in this order -- highest signal first:

Non-negotiable first:

- ☐ Brand guidelines
- ☐ Copy guidelines / tone of voice docs
- ☐ All brand related assets first received at onboarding stage

Don't have these? Write a one-pager summarizing what you know and upload that instead.

Performance context second:

- ☐ Top performing emails and SMS for the last 2 years
- ☐ Consider taking actual campaign exports and sorting by performance so it knows bottom performers as well
- ☐ Klaviyo and SMS reports that you manually export. (Use Report Builder)

Most recent full month plus your single best performing period -- don't upload everything.

- ☐ Weekly review decks

Creative reference third:

- ☐ Previously approved copy and winning subject lines
- ☐ Competitor examples the client has referenced
- ☐ Voice-of-customer language from reviews or surveys
- ☐ Any research or audience data

Do not upload: client contracts, anything with customer PII, or raw customer data. If you're unsure, ask before uploading.

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Step 4: Test It Before You Trust It

Don't assume it works just because it's set up. Before using it on real work:

- ☐ Ask Claude to write a sample email for the brand
- ☐ Ask Claude to summarize the audience
- ☐ Ask Claude what it knows about the brand's tone

If the output feels generic or off, your files are probably thin or mislabeled. Fix the inputs before you rely on the outputs.

Step 5: Keep It Current

A stale project is almost as bad as an empty one.

- ☐ Update after every major campaign
- ☐ Update any time the client changes direction on messaging, offers, or audience
- ☐ Full review monthly at minimum

Last updated: ________________ Strategist: ________________