

How to Build a Claude Skill for Sales Call Prep

Turn your sales call prep into a repeatable Claude skill so you stop rewriting the same process every time. Built around Alex Hormozi's CLOSER method, this walkthrough takes prep from about two hours down to fifteen minutes, and produces a clean one-page call plan for any prospect.

Watch the full walkthrough:
youtube.com/@EmileGiovannie

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1. Understand what a Claude skill is and why it helps

A skill is your method written down once so Claude can reuse it. Instead of rewriting sales call prep from scratch every time, you turn your process into a repeatable system. In the demo this cuts prep time from 2 hours to 15 minutes. Think of it like writing a recipe on a card instead of explaining it from memory every time.

2. Identify the four parts every skill needs

Every skill should include:

- **Name:** what you call the skill
- **Trigger:** when Claude should use it
- **Steps:** the exact method Claude should follow
- **Example:** what a good finished result looks like

These four pieces are the foundation for building a useful skill.

3. Open Claude's Skill Creator

Open Claude, press the **forward slash (/)** key, and select **Skill Creator** from the menu. This is the built-in function for creating, modifying, and improving skills.

4. Write the skill prompt for your sales call prep process

Paste a prompt that tells Claude to create a skill for your sales prep workflow. In the example the skill is called **Prep Closer**. Define the trigger clearly:

- Use this whenever you have prospect information before a sales call you intend to close.

Then define Claude's role: it should act as your **sales strategist** and use the **CLOSER method** by Alex Hormozi. Keep the instructions in plain English.

5. Add the step-by-step structure Claude should follow

Tell Claude to structure the call prep using the six CLOSER phases:

- **C** = Clarify
- **L** = Label
- **O** = Overview
- **S** = Sell (the vision)

- **E** = Explain
- **R** = Reinforce

This gives Claude a framework for organizing the prep document, so the output stays consistent and easy to use.

6. Make Claude ask for missing context before generating the full output

Add an instruction that Claude should stop and ask for a short brief first. This prevents it from generating a full document without enough context. Ask for key details such as:

- a **three-line profile** of the prospect
- what is **blocking** them
- why they **failed the offer**
- any **red flags**

This keeps the output relevant and avoids wasting tokens.

7. Customize the objection-handling section

For the E phase (Explain), ask Claude to prepare objections based on the prospect's real profile. Example instruction: prepare at least **five objections** built from the prospect's actual situation. Ask for a structured response format, such as:

- objection
- response one
- response two
- follow-up

Add a boundary like **never invent data** so the skill stays grounded in reality.

8. Provide a strong example of the finished output

Include an example of what a completed call plan should look like, with a real-looking prospect profile and a filled-in call plan. In the demo the example uses **Jordan Reyes** and includes details like meeting date, background, and clarifying questions. This teaches Claude what a good result should look like.

9. Let Claude generate and refine the skill

Send the prompt. Claude builds the skill using the Skill Creator. It may run a self-test and ask a follow-up question to confirm the output format. In the demo, Claude asks whether to package the output as-is or tweak it. Confirm your preferred option so Claude can finish the skill.

10. Save the finished skill

Once Claude finishes, you'll see the generated skill markdown. Review it to make sure it includes the goal, the standard example, and the full structure. Click **Save Skill** to store it in Claude. After saving, the skill becomes reusable anytime you need sales call prep.

11. Use the skill on a real prospect

Press **/** again in Claude and select your saved skill, such as **Call Prep Closer**. Paste in a prospect example, like the Jordan profile. Claude generates a full one-page call plan based on that prospect's information, ready to use in your sales conversation.

12. Apply the output during the sales call

Use the generated call plan as your live conversation guide. The skill gives you:

- the prospect summary
- the likely blockers
- the questions to ask first
- the objection-handling framework

This reduces mental load and helps you stay focused during the call. If you type quickly you could even use it live, though that isn't recommended.

13. Takeaway and next step

The main workflow is simple: open Claude, press /, use **Skill Creator**, and build a skill for a recurring task. The prompt and questions from this walkthrough are in the video description. There's also a free 2-minute AI audit to help spot ways AI can improve your business processes.

The Prompt: Paste This Into Skill Creator

Open Claude, press / and choose Skill Creator, then paste the prompt below. Swap in your own offer, method, and example. Claude will turn it into a saved skill you can reuse before every call.

Create a skill called "Call Prep Closer."

TRIGGER: Use this whenever I paste a prospect's notes, intake form, or discovery-call summary before a sales call I intend to close. Trigger it even if I don't say "call prep" by name. Do not use it for cold outreach or for prep with an existing client where nothing is being sold.

ROLE: You are my sales strategist. You prepare the one-page plan I read before I dial, using Alex Hormozi's CLOSER method. Write in plain, direct, spoken English. No hype, no consultant words, no em dashes.

TWO-STAGE RULE (do not skip):

Stage 1 - THE READ. First give me a short read in chat (not the plan):

1. Three-line profile: who they are, their numbers, what they want, the pattern that keeps them stuck.
2. The real block, and the evidence in their data that points to it.
3. What they already tried and why it failed. Never call the effort dumb.
4. The offer and payment structure you'd recommend for their cash reality.
5. Red flags: budget, authority, timeline, tire-kicker patterns. If none, say none. Don't invent concern.

Then write "Say go and I'll build the plan" and STOP. Wait for my go. Never build the plan in the same turn as the read.

Stage 2 - THE ONE-PAGE PLAN. Only after I say go, build it in the six CLOSER phases, one page:

- C - Clarify: 2 open questions that confirm what the intake told you.
- L - Label: restate their real problem in one sentence, in their words.
- O - Overview: one question that surfaces what they tried and why it stopped.
- S - Sell the vision: paint their after-state using a number they gave you.
- E - Explain: the offer in 2-3 lines, then at least FIVE objections built from THIS prospect. For each: their exact phrase in quotes, two different responses (one tied to a number they gave), and a follow-up

question that hands the answer back to them. Never win the argument.
R - Reinforce: one close line, one next step, then go quiet. End with both branches: next step if yes, and book the follow-up if they stall.

BOUNDARIES: Never invent data about the prospect. Never promise specific results. No pressure or manipulation. The plan is a guide, not a script.

EXAMPLE: Include a filled-in sample plan for a made-up prospect (name, meeting date, background, clarifying questions, and the full CLOSER plan) so the skill knows what a good finished result looks like.

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