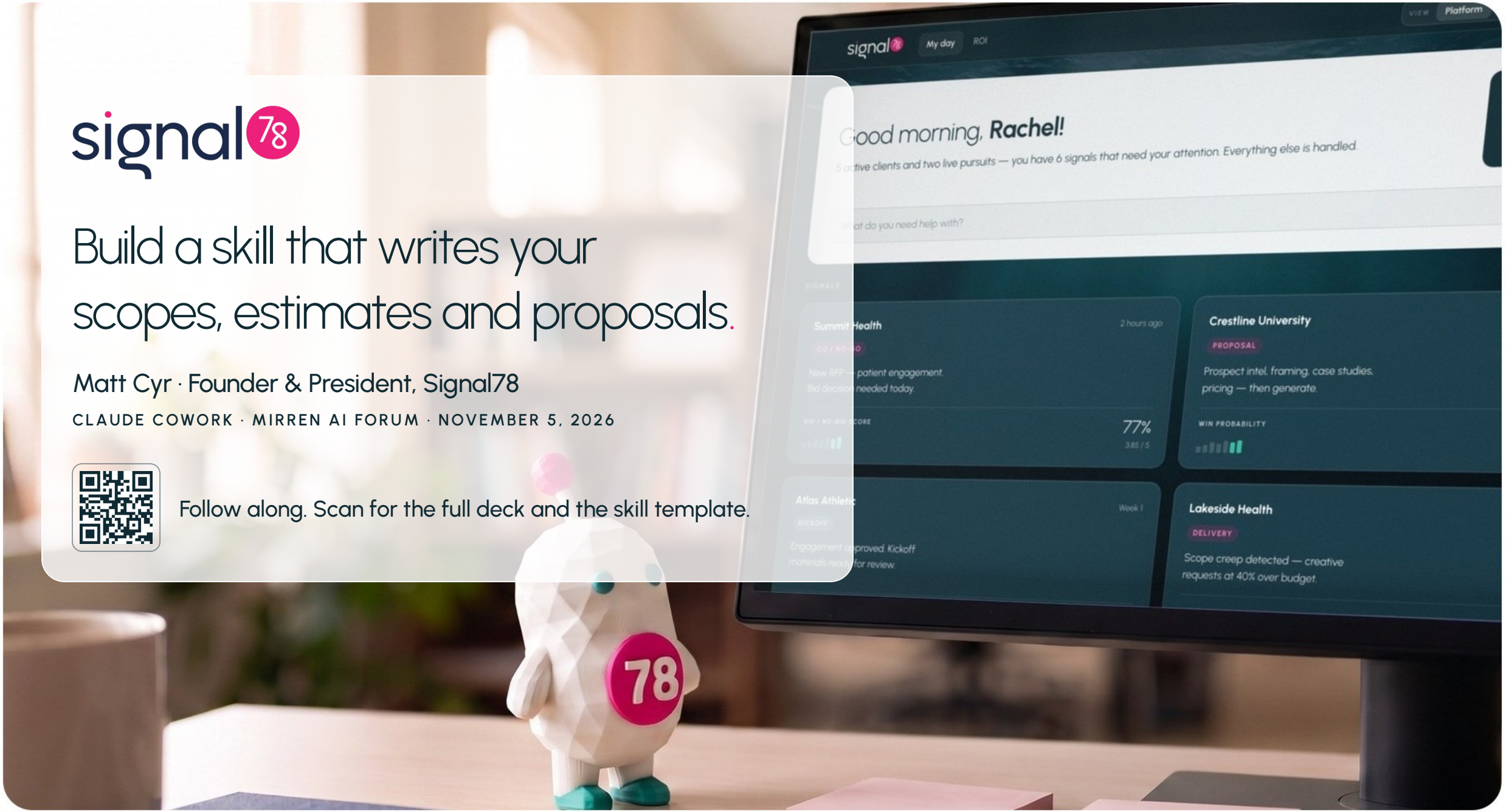
Build a skill that writes your scopes, estimates and proposals.

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CLAUDE COWORK · MIRREN AI FORUM · NOVEMBER 5, 2026

Follow along. Scan for the full deck and the skill template.



THE PROBLEM

Every agency writes the same documents, dozens of times a year.

- A scope for a client you already know.
- Priced off numbers you already have.
- In a format you've already used.

So why does each one still start from a blank page?

WHAT LANDS IN YOUR INBOX

"Loved the demo last week. Can you scope a pilot for our new-business team? Need numbers before Thursday's partner meeting."

- An agency COO, two lines

FIRST, WHAT'S A SKILL?

A playbook Claude reads before it starts.

Instructions

One plain-language file: when to use it, the steps to follow, what good looks like.

Reference files

Your rate card, past SOWs, templates and examples, packaged with it.

Repeatable

Runs the same way every time, for anyone on the team who has it.

TODAY'S SKILL, AS A FOLDER

- scope-writer/
  - SKILL.md
  - account-notes/
  - past-sows/
  - rate-card.xlsx
  - actuals-vs-estimates.xlsx
  - scope-template.docx

SKILL.md is the playbook. Everything else is what it draws on.

TODAY'S BUILD

From a two-line request to a credible first draft.

In minutes, with your judgment kept where it's needed.

IN

A two-line client request

Email, call notes or a Slack message. Whatever the client sent.

→

THE SKILL

3 layers of what you know

Account intelligence. Structure, voice and templates. Strategic point of view.

→

OUT

Scope, estimate, proposal

Drafted in your format, with the judgment calls flagged for a human.

WHAT WE'RE BUILDING

A skill: a playbook Claude reads before it starts.

One folder of instructions and reference files, built in three layers.

01



Account intelligence

What you already know about the client: prior SOWs, estimates against actuals, rate cards and what they always ask for.

02



Structure, voice and templates

How your scopes are built and how your agency writes, so the draft comes out in your format and your language.

03



Strategic point of view

The hard part: a recommendation, with what's out of scope and where a human needs to push back.

LIVE IN CLAUDE COWORK

Let's build it.

Blank file to working skill, one layer at a time, then the finished result.

01

Show the folder

The files the skill will read.

02

Layer 1

Account intelligence.

03

Layer 2

Structure, voice and templates.

04

Layer 3

Strategic point of view.

05

Run it

Paste the two-line request.

06

The finished proposal

Scope, estimate and judgment calls.

LAYER 1 OF 3

Account intelligence.

Teach it what you already know about the client.

- Prior SOWs and change orders
- What similar work actually took, against what you estimated
- Rate card and approved roles
- Approved deliverable definitions
- The things this client always asks for



WHAT IT CHANGES

The estimate starts from what the work actually took, instead of what you hoped it would take.

LAYER 2 OF 3

Structure, voice and templates.

Encode how your scopes are built and how your agency writes.

- Your scope template and section order
- Standard terms, assumptions and exclusions
- Two or three of your best past proposals
- The words you use, and the ones you never do



WHAT IT CHANGES

The draft comes out in your format, your terms and your language, ready to red-line.

LAYER 3 OF 3

Strategic point of view.

Make it write a recommendation instead of an order form.

01

Why this approach

The reasoning behind the plan, tied to what this client is trying to achieve.

02

What's out of scope, and why

Named up front, so the boundary is a decision the client can see.

03

Where a human pushes back

The places the estimate needs a senior eye before it goes out.

JUDGMENT STAYS HUMAN

Build the skill to flag the judgment calls.

Each flag goes to the person who owns the client, with the reason attached.



Estimate below history

Lower than what similar work actually took.



Margin under your floor

The price works for the client but not for you.



New kind of work

Nothing in the account history to price it from.



Assumptions it had to make

Anything the request didn't say, listed for a check.

WHAT COMES OUT

A first draft worth a senior person's time.

01

Scope of work

Deliverables, phases and assumptions, in your template.

02

Estimate

Hours by role at your rates, checked against past actuals.

03

Proposal

The recommendation and the reasoning, in your agency's voice.

04

Judgment calls

What a human must decide before it goes out.

BUILD YOURS THIS WEEK

Five steps to your own scope skill.

01 Pick one document. The one you write most often, for clients you already know.

02 Gather the evidence. Past SOWs, your rate card, and estimates against actuals.

03 Write the playbook. Your structure, terms and voice, in plain language.

04 Teach it to recommend. Why this approach, what's out, and what to flag.

05 Run, red-line, repeat. Fold every edit back in so the next draft starts better.



Download the full deck, the skill template and setup guides for Claude and other tools.

BEYOND SCOPES

Same three layers, other documents.

Once you've built one, the next one goes faster.

Change orders

Priced against the original scope and the work to date.

Status reports

The client's format, with the risks called out.

RFP responses

Your case studies and credentials, matched to the brief.

Creative briefs

What the client said, turned into what the team needs.

Business reviews

Results, learnings and the next recommendation.

Case studies

From the scope, the work and the results you already have.

TAKE IT WITH YOU

Everything you need to build yours.

Using a different AI tool? The three layers work there too.

- The skill from today, as a starting template
- Step-by-step setup in Claude Cowork
- The same build in ChatGPT, Gemini and Copilot
- The five steps, as a one-page checklist



Let's connect.

- In the Loop: Weekly newsletter on the latest AI news and breakthroughs
- Regular blog posts: An opinionated perspective on AI and where it's heading.



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