EPISODE 14 · BLUEPRINT

# The Per-Client Claude Project Starter Kit

Built from **Louise Brogan**'s client content workflow · The AI Social Playbook

> **What this is, and what it isn't.** Louise showed key lines of her project instructions and the names of her three knowledge files on screen, but not their full text. The instruction rules quoted below (American spelling, never invent client stories, quotes are data, leave a placeholder, check with me first) come from the episode. The surrounding wording, the knowledge file templates and the request prompt are reconstructions built around those rules, marked where they go beyond what was shown. Her production setup ran on Claude Opus 5.5 with the Descript and Canva connectors.

## 01 Technical Stack

| TOOL | ROLE IN THE WORKFLOW | NOTES |
|---|---|---|
| **Claude (Projects)** | One project per client holds the instructions, knowledge files and session transcripts. Generates post ideas and carousel copy. | Opus 5.5 in the demo. Projects keep outputs (artifacts) with the client's other material. |
| **StreamYard** | Records the 30-minute client video session. | Recording downloaded and taken into Descript. StreamYard's transcript service was not used. |
| **Granola** | Runs alongside the call and produces a summary of the session, including which videos were recorded. | Free plan in the demo, which keeps notes for 30 days. Records outside the meeting app, so tell everyone on the call. |
| **Descript** | Edits the session into short videos and supplies the transcript. | Connected to Claude as a connector, so Claude can pull a video by name. |
| **Canva** | Holds a brand kit and a project per client. Claude builds carousel graphics inside the brand kit. | Connected to Claude as a connector. |
| **Agorapulse** | Schedules the approved posts. | Named in the episode as the scheduling tool. |

## 02 Configuration

Set these up once per client, before the first session.

### A Claude Project named for the client

One project per client, never shared. Paste System Prompt 1 into the project instructions and upload the three knowledge files from System Prompts 2 to 4.

### Descript and Canva connectors

Add both from Claude's connector settings. In the demo, Claude chose the right connector from the request without being told which one to use.

### A Canva brand kit for the client

Logos, color palette, fonts, a written brand voice, and the client's own photographs in place of AI images. Pick a Canva template the client would like, copy it and recolor it in their brand, so generated carousels start from a design you chose.

### A check-first rule WORDING ADDED

Louise's Claude has to check with her before it does anything, in projects and in general chats. The episode didn't show where she set this. System Prompt 5 is one way to write it into your own preferences.

## 03 Flowchart Map

1. **Set up the client project** SYSTEM PROMPTS 1-5
   IN Client details, pipeline, brand rules → OUT A project that knows one client
2. **Record the client session**
   IN A 30-minute conversation in StreamYard, with Granola running → OUT Raw recording plus a Granola summary
3. **Edit and transcribe in Descript**
   IN The raw recording → OUT Short videos and the session transcript (a 23-minute session gave four YouTube videos plus LinkedIn clips)
4. **Request ideas and graphics** SYSTEM PROMPT 6
   IN The transcript or a named Descript video → OUT Post ideas and carousel copy, plus graphics in the Canva brand kit
5. **Human copywriter writes the posts**
   IN Claude's ideas plus the transcript → OUT Finished posts in the client's words
6. **Client approval**
   IN Posts and graphics, sent by the account manager → OUT Client sign-off on every piece
7. **Schedule**
   IN Approved content → OUT Posts scheduled in Agorapulse

## 04 System Prompts

Copy each panel whole. Replace every highlighted variable before running.

SYSTEM PROMPT 1 · PROJECT INSTRUCTIONS

### Client Project Instructions

COPY WHOLE

```
YOUR JOB
You support content for [CLIENT NAME], [CLIENT ROLE AND BUSINESS].
For this client we create [OUTPUTS, E.G. LINKEDIN POSTS AND CAROUSELS].
Your role is to suggest ideas and draft structure. A human writer
writes the final posts.

RULES
1. Use [US OR UK] spelling throughout.
2. This is the voice of the client. Write as [CLIENT NAME]
   speaks in the transcripts, not in a generic marketing voice.
3. Never invent client stories. Use only stories, examples and
   results that appear in a transcript or a knowledge file.
4. Quotes are data. Reproduce quoted lines exactly as spoken.
   Do not tidy, shorten or improve them.
5. Where information is missing, leave a placeholder in square
   brackets so we can go and check. Do not fill the gap.
6. Only offer the outputs listed above. Do not suggest other
   formats or platforms.
7. Before you start any task, tell me what you plan to do and
   wait for me to confirm.

CHECK THESE FILES BEFORE EVERY TASK
- Client overview
- Content pipeline
- Brand style and content principles
```

SYSTEM PROMPT 2 · KNOWLEDGE FILE

### Client Overview

COPY WHOLE

```
CLIENT OVERVIEW
Name: [CLIENT NAME]
Business: [COMPANY AND WHAT IT DOES]
Audience: [WHO THE CLIENT'S CONTENT IS FOR]
Location and spelling: [COUNTRY, US OR UK SPELLING]
Platforms we produce for: [E.G. LINKEDIN, YOUTUBE]
Topics the client speaks on: [3-6 TOPICS]
Topics to avoid: [ANYTHING OFF LIMITS]
Terms the client uses (keep as written): [THEIR OWN PHRASES]
```

SYSTEM PROMPT 3 · KNOWLEDGE FILE

### Content Pipeline

COPY WHOLE

```
CONTENT PIPELINE
1. [CLIENT NAME] records a [LENGTH] video session every
   [CADENCE].
2. Raw files go to [EDITOR], who cuts clips for [PLATFORMS].
3. Transcripts come into this project.
4. Claude suggests ideas. [WRITER] writes the posts.
5. [ACCOUNT MANAGER] sends everything to the client.
6. The client approves every piece before scheduling.

CHECKLIST FOR EVERY SESSION
- Transcript added to this project
- Ideas reviewed against the transcript
- Placeholders resolved or flagged to the client
```

SYSTEM PROMPT 4 · KNOWLEDGE FILE

### Brand Style and Content Principles

COPY WHOLE

```
BRAND STYLE AND CONTENT PRINCIPLES
Tone: [3 WORDS THE CLIENT WOULD USE ABOUT THEIR OWN VOICE]
Canva brand kit: [BRAND KIT NAME]
Template to use for carousels: [TEMPLATE NAME]
Photography: use the client's own photos from the brand kit.
  No AI-generated photos of people.
Graphics never cover the client's face.
Always: [RULES THE CLIENT HAS GIVEN YOU]
Never: [WORDS, CLAIMS OR STYLES TO AVOID]
```

SYSTEM PROMPT 5 · PERSONAL PREFERENCES

### Check-First Rule

COPY WHOLE

```
Before you take any action, create anything or call any
connector, summarize what you are about to do and ask me to
confirm. Wait for my yes before you start.
```

SYSTEM PROMPT 6 · SESSION REQUEST

**Ideas and Graphics From a Session**

COPY WHOLE

```
Use [TRANSCRIPT, OR THE DESCRIPT VIDEO NAMED "VIDEO TITLE"]
to help create content for [CLIENT NAME], using the
[BRAND KIT NAME] brand kit inside Canva.

I want [NUMBER] ideas for LinkedIn posts, and carousel copy
and graphics for [ONE IDEA OR TOPIC].

Keep every quote exactly as it appears in the transcript.
Mark anything you had to assume with a placeholder.
```

## 05 Variable Callouts

| VARIABLE | WHAT IT IS | WORKED EXAMPLE |
|---|---|---|
| [CLIENT NAME] | The client the project belongs to | Dana Whitfield |
| [CLIENT ROLE AND BUSINESS] | One line on who they are | Leadership coach and founder of a small coaching practice |
| [OUTPUTS, E.G. ...] | Exactly what the project produces | LinkedIn posts, LinkedIn carousels, YouTube video descriptions |
| [US OR UK] | The client's spelling convention | US |
| [LENGTH] / [CADENCE] | Session length and frequency | 30-minute session every four to six weeks |
| [EDITOR] / [WRITER] / [ACCOUNT MANAGER] | Who owns each step on your team | Editor: you. Writer: your copywriter. Account manager: your content assistant |
| [BRAND KIT NAME] / [TEMPLATE NAME] | The client's Canva brand kit and chosen template | Whitfield Coaching kit, recolored carousel template |
| [TRANSCRIPT, OR THE DESCRIPT VIDEO ...] | Pasted transcript, or a named video if Descript is connected | The Descript video named "Leading through change" |
| [NUMBER] / [ONE IDEA OR TOPIC] | How many ideas, and which one becomes a carousel | Four ideas; carousel on the strengths-based feedback idea |

## 06 Human Quality Control

Three checks before anything goes to the client for approval.

**Check 1. Every quoted line appears word for word in the session transcript.**

CATCHES A quote the model tidied or shortened while believing it kept it intact. Search the transcript for each quote before it ships.

**Check 2. Every story, example and result traces to a transcript or a knowledge file, and no placeholder is left unresolved.**

CATCHES An invented client story, or a gap filled with something plausible. Resolve placeholders with the client rather than guessing.

**Check 3. The graphics use the client's brand kit, their own photos and the right spelling, and never cover the client's face.**

CATCHES A generic carousel, an AI stock photo, or UK spelling on an American client's post: the details a client notices first.