

Claude Custom Instructions Builder

Your personal system prompt, built step by step

Custom instructions tell Claude who you are and how you want it to work. They load automatically in every conversation, so you never have to repeat yourself. This worksheet walks you through building yours. Fill it out, then paste the result into Claude's custom instructions setting.

Where to set them: Claude.ai > Settings (bottom left) > Custom Instructions. Or in the Claude desktop app: Settings > Custom Instructions.

Step 1: Who You Are

Claude can't tailor its help if it doesn't know your context. A CFO and a high school teacher need fundamentally different responses to the same question.

Your role / job title

e.g., Marketing Director, 7th grade science teacher, freelance writer

Your industry or field

e.g., Healthcare, SaaS, K-12 education, real estate

Your experience level with AI

e.g., Brand new, I've used ChatGPT a bit, I use AI daily

What you're primarily using Claude for

e.g., Writing emails, research, lesson plans, code review, brainstorming

Step 2: How You Want Claude to Communicate

Claude defaults to a certain style. You can change it. Be specific — "be concise" works much better than "be good."

tone preferences

Check all that apply, or write your own:

Direct and concise	Warm and conversational	Formal and professional
Casual and friendly	Technical and precise	Encouraging and supportive

Your own words for how Claude should sound

e.g., Like a smart colleague, not a professor. Skip the preamble.

response length

Short and punchy	Medium — a few paragraphs	Detailed and thorough	Depends — ask me
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formatting preferences

e.g., Use bullet points, avoid headers, always use plain English, no emojis

Step 3: What Claude Should Always Know

Anything you find yourself repeating in every conversation belongs here. Think about the context you always need to provide.

Key facts Claude should always know about you or your work

e.g., I manage a team of 12, my company sells industrial equipment, I write for a UK audience

Common tasks you'll ask Claude to help with

e.g., Draft client emails, summarize meeting notes, create lesson plans for AP History

Things Claude should never do

e.g., Don't use corporate jargon, never start with 'Certainly!', don't make things up

Step 4: Assemble Your Instructions

Now combine your answers into a single block of text. Here's a template — fill in the brackets with what you wrote above, then delete anything that doesn't apply.

I'm a [your role] in [your industry]. I use Claude primarily for [your main uses].

When responding:

- Be [your tone preferences]
- Keep responses [your length preference]
- [Your formatting preferences]

Things to know about my work:

- [Key fact 1]
- [Key fact 2]

Never:

- [Thing to avoid 1]
- [Thing to avoid 2]

Example: A Finished Set of Instructions

I'm a marketing director at a B2B software company (50 employees). I use Claude for drafting customer emails, creating slide decks, and brainstorming campaign ideas.

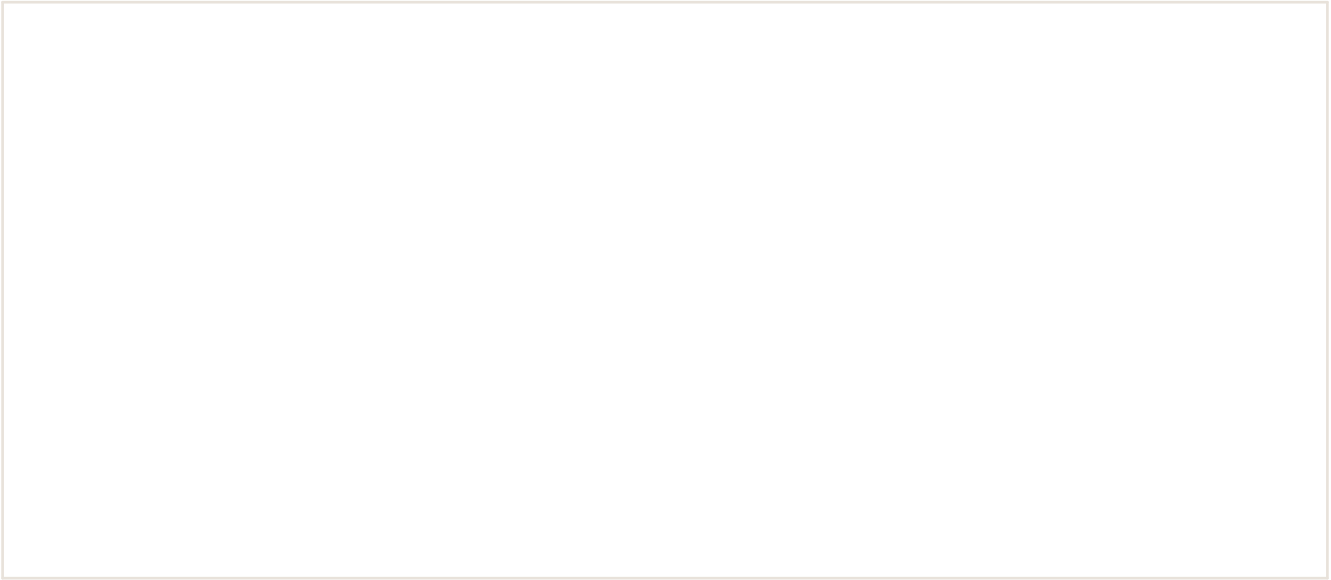
Be direct and concise. Skip the preamble – get straight to the answer. Use plain English, not marketing jargon. When I ask for options, give me 3-5, not 10. Format with bullet points when listing things.

My audience is IT directors and CISOs at mid-market companies. They're skeptical of hype and respond to specifics.

Never use phrases like 'leverage,' 'synergy,' 'holistic approach,' or 'circle back.'
Never start a response with 'Great question!' or 'Absolutely!'

Your Final Custom Instructions

Write your finished version here, then copy it into Claude:



Pro Tips

Start small, iterate often. You don't need perfect instructions on day one. Use Claude for a week, notice what you keep correcting, and add those corrections to your instructions.

Be specific about what you hate. "Don't use corporate jargon" works better than "be natural." "Never start with 'Certainly!'" works better than "don't be robotic."

Update quarterly. Your role changes. Your projects change. Your instructions should change too.

Test with a real task. After setting your instructions, ask Claude something you'd normally ask. Does the response feel right? If not, tweak.

This worksheet is a companion to Chapter 1 of [Creating with Claude: A Practical Guide for Everyone](#). The book walks you through setting up Claude from scratch — including the story of how these exact instructions were discovered and refined. Get the book at marquepublishing.com.