

A PRACTICAL, NO-CODE GUIDE

built to help you deliver

Build Your Marketing Playbook



A step-by-step guide for any B2B marketer. Capture how your marketing works, then use Claude Code to help you deliver it. No coding, no jargon.

The goal: a marketing engine you can actually run, week after week, with a capable assistant doing the heavy lifting beside you.

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The one idea behind this whole guide

A playbook is not a document that sits in a drawer. It is a set of clear instructions that a capable assistant can read and act on, so the marketing actually gets delivered.

TWO HALVES, ONE SYSTEM

- 1 You write down how your marketing works: who you sell to, what you say, the jobs you do each week. **That is the playbook.**
- 2 Claude Code reads that playbook and helps do the work: it drafts the newsletter, writes the posts and replies to a review, **in your voice, for your audience.**

So the work that used to live only in your head is written down where Claude can read it, and Claude helps you get it out the door.

HOW MUCH TIME DOES THIS TAKE?

You can get a useful version going in an afternoon. Do the foundation first (Stages 1 and 2), then add a play or two.

A half-built playbook that already drafts your newsletter beats a perfect one you never finish.

There is nothing to code. You talk to Claude in normal English, the same way you would brief a new team member.

SETUP · FIVE MINUTES BEFORE YOU BEGIN

1

Get Claude Code

Install the desktop app (Mac or Windows), or open claude.ai/code in your browser. You will not touch a command line.

2

Make a folder

Call it **Marketing Playbook**. This folder is your playbook. Everything lives here.

3

Open it in Claude Code

Point Claude at the folder and chat. When it offers to create or edit files, say yes. Those files are your playbook taking shape.

New to this? Type `/setup-cowork` when you first open Claude Code. It is a gentle, guided setup that walks you through connecting your tools and trying your first task.

Work top to bottom. Each stage shows what to **capture** and what to **type into Claude** to capture it fast. A stage is done when someone unfamiliar could act on it without asking you.

1 Who we're for & what we sell

The foundation. Everything else points back to this.

CAPTURE

- ☐ Our 2 to 4 ideal customer types (by size, industry, or buying stage)
- ☐ Who actually decides: the economic buyer, the champion, the end user, the blocker
- ☐ Their top 3 pains in their own words
- ☐ Our offers in plain terms (products, services, tiers)
- ☐ One line on why us, not the competitor down the road (speed, specialism, service, price)

TYPE THIS INTO CLAUDE

"Read our website [paste your web address] and our two main competitors. Then draft a short summary of who we sell to, who decides, their top pains, and what makes us different. Plain, no jargon. Save it as who-we-serve."

2 What we say (message & proof)

How the brand sounds, and the evidence that backs it up.

CAPTURE

- ☐ Our brand voice in 3 words, plus a short do and don't list (e.g. "plain, calm, confident")
- ☐ One core message per offer: the promise a prospect should remember
- ☐ A proof file: case studies, testimonials, reviews, awards, certifications, recognisable logos
- ☐ The standard "About us" paragraph used everywhere

TYPE THIS INTO CLAUDE

"Help me describe our brand voice in three words and a short do and don't list. Then write one memorable promise for each offer in who-we-serve. Save it as how-we-sound."

3 How we reach them (the plays)

For each channel you use, a short repeatable recipe anyone could follow.

CAPTURE · ONE SHORT PLAY PER CHANNEL YOU ACTUALLY USE

- ☐ Website & SEO (key pages, blog cadence)
- ☐ Email & newsletter (the list, how often, what each send is for)
- ☐ LinkedIn & social (company page, and who posts)
- ☐ Referrals & reviews (how and when we ask)
- ☐ Partner & co-marketing: note any co-marketing or market development funds (MDF). Budget many teams leave unclaimed.
- ☐ Events: webinars, lunch-and-learns, industry groups

TYPE THIS INTO CLAUDE (REPEAT PER CHANNEL)

"Write a simple how-to for our monthly newsletter the way we do it: what goes in it, who it is for, how often, and where it gets sent from. Save it in a folder called plays."

4 The tools & the keys

What you use, and where access lives. Not the passwords themselves.

CAPTURE

- ☐ A table of every tool: name, what it is for, who owns the account
- ☐ Where logins live (a password manager, never this document)
- ☐ CRM, email platform, social scheduler, website / CMS, analytics, design (Canva)
- ☐ Any outside agencies or contractors: what they do, contact, contract renewal date

TYPE THIS INTO CLAUDE

"Make me a table of our marketing tools with columns for tool, what it's for, and who owns it. I'll read you the list. Save it as our-tools."

Never put passwords in these files. The playbook only records *where* access lives. Keep the actual logins in a password manager.

5

The operating rhythm (the calendar)

The recurring work. This is the heart of a leave-proof playbook.

CAPTURE

- ☐ **Weekly** tasks (social posts, lead follow-up, review monitoring)
- ☐ **Monthly** tasks (newsletter, blog, report, partner check-in)
- ☐ **Quarterly** tasks (a campaign, a webinar, a strategy review)
- ☐ Put it in a shared calendar with reminders, not only in this document

TYPE THIS INTO CLAUDE

"Turn our plays into a recurring marketing calendar, grouped by weekly, monthly and quarterly. For each task list what it is and which play to follow. Save it as marketing-calendar."

6

How we know it's working

A few honest numbers, and who pulls them.

CAPTURE

- ☐ The 3 to 5 numbers that matter (leads per month, website enquiries, demo or booking requests, email open rate, pipeline from marketing)
- ☐ Where each number lives, and who pulls the report and how often
- ☐ A simple one-page monthly snapshot template

TYPE THIS INTO CLAUDE

"Help me pick the 3 to 5 marketing numbers worth tracking for our business, note where each one comes from, and make a simple one-page monthly report template. Save it as how-we-measure."

7

The handover pack

The part that makes stepping away safe.



CAPTURE

- ☐ **In-flight right now:** campaigns mid-run, drafts, commitments, deadlines
- ☐ **Key contacts:** vendors, agency, web host, designer (name, email, what they handle)
- ☐ **Decisions log:** "we tried X, it did not work; we are committed to Y"
- ☐ **"If this happens, do this":** a few likely situations (a bad review, a vendor deadline, the website goes down) and who to call
- ☐ **The point person** while you are out, plus an escalation contact

TYPE THIS INTO CLAUDE

"Help me write a handover pack: what's in flight, key contacts, decisions we've made, a few 'if this happens do this' situations, and who covers what. Ask me questions until it's complete. Save it as handover."

This is the page your future cover will thank you for.

The one move that makes all of this work

Create a single **"read me first"** file so Claude always knows your company before it helps with anything. Once it exists, you never have to re-explain your business. Claude reads it automatically every time.

TYPE THIS INTO CLAUDE

"Create a short brief that pulls the key points from who-we-serve, how-we-sound and our-tools into one place: who we are, who we sell to, how we sound, and our proof. Save it as the file Claude should always read first before helping me. Keep it under one page."

THE PAYOFF · USE THE PLAYBOOK TO DO THE WORK

Because the brief and the plays exist in the folder, you (or whoever covers for you) can open it in Claude Code and simply ask for the work. Claude follows the playbook.

→ "Write this month's newsletter, following our newsletter play."

→ "Draft three LinkedIn posts for this week in our voice."

→ "A customer left a 2-star review. Help me reply the way our playbook says."

→ "It's the start of the month. What's on our calendar? Let's start the first task."

The playbook stops being a document that describes the work and becomes the instructions that **produce it.**

Keep it simple, keep it moving

DO

- Start with the foundation (Stages 1 and 2) and the "read me first" brief.
- Keep each file short and plain. Bullet points are fine.
- Let Claude draft, then you correct. Editing is faster than starting blank.
- Always check Claude's drafts before anything goes out. A fast assistant, not a final approver.
- Save a copy of the whole folder to a shared cloud drive so the team has it while you are away.

DON'T

- ✗ Don't put passwords or card details in any file. Use a password manager.
- ✗ Don't connect every tool on day one. Start with writing and files; add connections later.
- ✗ Don't aim for perfect. A rough playbook that exists beats a polished one that doesn't.
- ✗ Don't share anything confidential about customers in drafts meant for the public.

YOUR FIRST WEEK · A GENTLE PLAN

DAY 1

Set up Claude Code & the folder. Do Stage 1 and Stage 2.

DAY 2

Make the "read me first" brief. Write your most important play.

DAY 3

Ask Claude to draft that one thing. See it work. This is the moment it clicks.

DAY 4

Add the rest of your plays and the operating calendar (Stage 5).

DAY 5

Write the handover pack (Stage 7) and save the folder to a shared drive.

THE BEST TEST OF YOUR PLAYBOOK

Open the folder in Claude Code and ask it to produce this month's newsletter. If a solid draft comes back in minutes, your playbook is doing its job: turning what you know into marketing that ships. **That is the whole point.**



NOW GO DELIVER



You've written it down. Now you can deliver it.

A good playbook turns scattered marketing into work that ships: a clear plan, your voice captured once, and Claude helping you produce it week after week.

- Foundation first: who you serve, how you sound.
- One "read me first" brief so Claude always knows the business.
- A recurring calendar so the work ships on schedule.

*Less time wondering what to do. More
marketing out the door.*



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