FREE SETUP GUIDE

The Complete Guide to Installing AI Skills in Claude

Step-by-step instructions to transform your Claude account into a specialized real estate AI assistant — in under 10 minutes.

2 Methods	9 Pages	Anthropic Sources	2026 Edition
Beginner & Advanced	Step-by-Step	Official Documentation	nextautomation.us

INTRODUCTION

What Are Claude AI Skills?

Claude Skills are structured instruction files (**.md** format) that tell Claude *exactly* how to perform a specific task. Think of them as giving a brilliant assistant a detailed playbook for your industry.

Instead of explaining what you need every time, Skills let you **front-load your expertise once** and reuse it across every interaction.

What's Inside Each Skill File?

```
---
name: ai-lead-qualifier
description: Qualifies inbound real estate leads
  using budget, timeline, and motivation criteria.
---

# AI Lead Qualifier

## When to Use
When a new lead comes in from your website, Zillow,
or a referral and you need to assess fit quickly.

## Process
1. Extract key details from the lead's message
2. Score against qualification matrix
3. Draft a personalized response
4. Flag hot leads for immediate follow-up
```

Two Ways to Install Skills

Feature	Method 1: Projects	Method 2: Skills
Difficulty	Beginner-friendly	Intermediate
Setup time	2 minutes	5 minutes
Best for	Quick reference & knowledge	Dynamic, task-specific activation
Activation	Always loaded in that project	Claude loads only when relevant

METHOD 1 — RECOMMENDED FOR BEGINNERS

Claude Projects: Upload as Knowledge

Projects are workspaces on claude.ai with their own chat history, knowledge base, and custom instructions. Upload your skill files and Claude references them in every conversation.

1 **Go to Claude Projects**

Open **claude.ai**. In the left sidebar, click **"Projects"**, then **"+ New Project"**.

2 **Name Your Project**

Give it a clear name like **"Real Estate AI Assistant"**. *Note: Claude can't see the name — it only reads instructions and files.*

3 **Set Project Instructions**

Click **"Set project instructions"** and paste context about your business.

```
# Example Project Instructions

You are an AI assistant for a real estate brokerage
specializing in residential properties in [Your City].

<role>
You help with lead qualification, listing descriptions,
market analysis, and client communications.
</role>

<style>
— Professional but approachable tone
— Use data to support recommendations
</style>

<context>
— Market: [Your City] residential real estate
— Tools: [CRM, MLS, etc.]
</context>
```

Pro Tip: Use XML Tags

Anthropic recommends XML-style tags like `<role>` and `<context>` to structure prompts. Helps Claude parse complex instructions without ambiguity. *(Source: Anthropic Prompt Engineering Guide)*

Upload & Verify Your Skills

4 **Add Skill Files to Project Knowledge**

On the right side of your project page, click **"+"**. Upload all the **.md skill files** you downloaded. Each file is available in every chat within this project.

5 **Start a New Chat Inside the Project**

Click **"New Chat"** within your project. Try: *"I just received this lead email — qualify them using the lead qualification skill."*

6 **Verify It's Working**

Ask Claude: *"What skills do you have access to?"* — it should list all files and describe each one.

How It Works Behind the Scenes

Your skill files → Project Knowledge → 200K context window → Claude's response

Claude loads your instructions and knowledge files into its **200,000 token context window** (~150,000 words).

Automatic RAG for Large Collections

If you upload many files, Claude automatically activates **RAG** — it searches your files and pulls only the relevant sections. Expands capacity by up to **10x**. Available on all plans. *(Source: Anthropic Support)*

File Limits

Parameter	Limit
File size	30 MB per file
Formats	.md, .txt, .pdf, .docx, .csv, .json, .html
Files per project	Unlimited (RAG handles overflow)
Context window	200K tokens (Pro) / 500K (Enterprise)
Projects on Free plan	5 maximum

Claude Skills: Native Installation

Unlike project knowledge (always loaded), Skills activate **dynamically** — Claude loads them only when relevant. You can have dozens installed without consuming context.

Projects (Knowledge)

Always loaded in context. Like a book open on your desk — always there but takes up space.

Skills (Dynamic)

Loaded only when needed. Like a bookshelf — Claude pulls only what's relevant to the task.

Step-by-Step Installation

1 **Organize Your Skill Files**

Each skill needs its own folder with a file named **SKILL.md** at the root. If you have a single .md file, rename it to `SKILL.md` and place it inside a named folder.

```
# Folder structure:

ai-lead-qualifier/
   SKILL.md           # Required — the main skill file

# With reference files:
property-description-writer/
   SKILL.md           # Main instructions
   references/
     tone-guide.md    # Supporting reference
```

2 **Ensure Proper YAML Frontmatter**

SKILL.md **must** start with a `name` and `description`. The description tells Claude **when to activate**.

```
---
name: ai-lead-qualifier
description: Qualifies inbound real estate leads by analyzing
  budget, timeline, and market fit.
---
# AI Lead Qualifier
[... skill content ...]
```

METHOD 2 — CONTINUED

Package and Install

3 **Create a ZIP File**

Select the skill **folder** and compress it. The ZIP must contain the folder at its root — not loose files.

```
# Correct:
my-skill.zip
  ai-lead-qualifier/      ← folder at root
    SKILL.md

# Wrong (will not work):
my-skill.zip
  SKILL.md                ← no wrapper folder
```

4 **Install in Claude**

Settings (gear icon) → **Features** → **Skills** → **"Upload Skill"** and select your .zip file.

5 **Verify Installation**

Start a new chat and trigger the skill: *"I just got a lead from Zillow — qualify them."*

How Claude Loads Skills (3-Tier System)

Tier 1 — Always loaded: Skill name + description (~100 tokens each).

Tier 2 — On trigger: Full SKILL.md body (under 5K tokens).

Tier 3 — On demand: Reference files, only when specifically needed.

50 skills installed = only ~5,000 tokens until one activates. *(Source: Anthropic Engineering Blog)*

Alternative: Create Skills by Conversation

You can also ask Claude directly: *"Create a skill that helps me write property descriptions for luxury listings."* Claude generates and installs it automatically. Start with our pre-built skills, then ask Claude to customize them for your market.

BEST PRACTICES

Pro Tips for Maximum Results

From Anthropic's official documentation and our experience deploying AI skills for real estate professionals.

1. Customize for Your Market

The skills you downloaded are templates. Personalize them with:

- ✓ Your city/region and market specifics
- ✓ Your typical client profile and deal size
- ✓ Your preferred tools (CRM, MLS, etc.)
- ✓ 3-5 examples of your best work

> **Anthropic's #1 Tip: Give Examples**
> "3-5 well-crafted examples dramatically improve accuracy and consistency." Add real examples — a listing description, a follow-up email, a lead qualification. Wrap in `<example>` tags. *(Source: Anthropic Prompt Engineering Guide)*

2. Tell Claude WHY, Not Just WHAT

Instead of: *"Never use passive voice"*
Write: *"Use active voice because our listings target first-time buyers who respond better to direct language."*

3. One Skill Per Workflow

A skill for "Lead Qualification" is better than "Everything About Leads." Focused skills activate more reliably and produce better results.

4. Set Up a Custom Style

Create a **Custom Style** in Claude settings by uploading samples of your writing. Claude matches your tone automatically.

Settings → Styles → **+ Create Custom Style** → Upload samples

5. Use the Right Model

Claude Sonnet — Fast, great for daily tasks (emails, descriptions).
Claude Opus — Deep analysis (market reports, deal evaluation, strategy).

ADVANCED

Going Further

Combine Skills + Projects

Project Knowledge

Upload **reference materials**: market data, comp tables, client notes. Your "background library."

Installed Skills

Install **action skills**: lead qualifier, description writer, email drafter. Activate on demand.

Troubleshooting

Issue	Solution
Skill doesn't activate	Improve the `description` field — be specific about **when** to trigger.
ZIP upload fails	Folder must be at ZIP root. SKILL.md inside the folder.
Context window full	Move large files to project knowledge. RAG handles overflow.
Inconsistent results	Add 3-5 concrete examples to SKILL.md.
Can't find Skills setting	Enable **code execution** in Settings → Features.

Recommended Plan

Claude Pro — $20/month
Unlimited projects, all models (Opus + Sonnet), 5x usage, priority access. Pays for itself after one qualified lead or listing description.

Official Anthropic Resources

✓ **Prompt Guide** — platform.claude.com/docs/prompt-engineering

✓ **Skills Docs** — support.claude.com/en/articles/12512176

✓ **Projects Guide** — support.claude.com/en/articles/9517075

✓ **Custom Styles** — support.claude.com/en/articles/10181068

These Skills Are Just the Start.

Claude Skills help you understand what's possible with AI in real estate. But if you want **real systems that run your operations** — off-market deal sourcing, underwriting automation, follow-up sequences, lead qualification pipelines, or any workflow you have in mind — we build those.

We'll scope your exact use case, design the automation, and deploy it — fully managed, fully custom.

Let's Talk About Your Use Case

nextautomation.us/contact

40+

COMPANIES AUTOMATED

6

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