

AI Marketing Workflow Field Guide

How to install, adapt, and maintain reusable AI workflows for marketing and sales teams.

Prepared for Christopher Pathinathan

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Prepared for Christopher Pathinathan's site as a practical explainer and starter pack.

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1. Why This Exists

Most teams do not need "more AI." They need reliable help with repeatable work:

- monitoring competitors,
- researching market moves,
- preparing sales and marketing briefs,
- building a newsletter pipeline,
- cleaning CRM data,
- turning messy inputs into useful decisions.

The difference between a one-off prompt and a reusable workflow is structure. A prompt asks the model to improvise. A workflow gives the model a role, source rules, quality checks, output labels, and a repeatable process.

Use this guide to deploy the included starter files in the AI coding or agent workspace of your choice. Claude Code supports the `SKILL.md` folder format directly. Codex supports skills as process playbooks in its skill library. Other agentic coding tools can usually use the same markdown as project instructions, rules, or reusable workspace context.

2. The Mental Model

Think of each workflow as a small operating manual:

1. **Identity:** what expertise the assistant is pretending to have, and where that expertise stops.
2. **Inputs:** what the user must provide before useful work can begin.
3. **Source hierarchy:** which sources count, which sources are weak, and what needs current web verification.
4. **Method:** the steps the assistant follows every time.
5. **Output contract:** the exact labels, tables, sections, and decisions the user gets back.
6. **QA loop:** what to check before trusting or reusing the output.

7. **Maintenance loop:** how to refresh the workflow as tools, models, markets, and user behavior change.

This is the boring part. Naturally, it is also the part that makes the whole thing useful.

3. What Is In The Starter Pack

The downloadable ZIP includes four labeled workflow packages:

Label	Folder	Use it for
01	01-competitor-content-monitor	Monitoring competitor pages, content, offers, and positioning changes.
02	02-competitor-research-brief	Producing a structured competitive research brief for a company, product, or category.
03	03-newsletter-operating-system	Turning web sources, sales questions, and rough ideas into a newsletter backlog and issue brief.
04	04-crm-hygiene-assistant	Auditing CRM exports for stale stages, missing fields, duplicates, and follow-up risks.

Each package includes:

- SKILL.md: the main workflow instruction file.
- README.md: install and usage notes.
- examples/example-output.md: a sample output shape.
- references/source-rules.md: source hierarchy, freshness, and quality rules.

4. Installing In Claude Code

Claude Code supports skills as folders containing a SKILL.md file.

Personal install

Use this when the workflow should be available across your own projects:

```
mkdir -p ~/.claude/skills
cp -R 01-competitor-content-monitor ~/.claude/skills/
```

Repeat for the other folders you want to use.

Project install

Use this when the workflow should travel with a project repository:

```
mkdir -p .claude/skills
cp -R 01-competitor-content-monitor .claude/skills/
```

Claude Code can load skills automatically when the task matches the skill description. You can also invoke a skill directly by name, depending on your Claude Code version and configuration.

Test prompt

After installation, try:

```
Use the competitor content monitor workflow to review these competitors:
- https://example-competitor-one.com
- https://example-competitor-two.com

Focus on homepage, pricing, blog, and resource pages. Produce a weekly change digest.
```

If the assistant does not use the workflow, make the description in `SKILL.md` more specific and restart/reload the workspace if needed.

5. Installing In Codex

OpenAI describes Codex skills as process playbooks: use a skill when Codex needs to follow your process; use a plugin when Codex needs to connect to another tool or source of information.

The included folders are written in the portable `SKILL.md` style so they can be adapted into a Codex skill library or kept in a project as reusable process files.

Recommended Codex setup:

1. Add the package folder to your project under a clear directory such as `.codex/skills/` or `ai-workflows/`.
2. Ask Codex to create or register the skill in your available skills surface if your workspace supports direct skill creation.
3. Keep the workflow folder version-controlled so changes are reviewable.
4. If the workflow needs external data, pair it with the right connector, MCP server, or API tool. A process file cannot magically access a CRM, search engine, or scraper without an available tool. Annoying, but reality remains undefeated.

Example Codex invocation:

```
Use the workflow in ai-workflows/02-competitor-research-brief to create a competitive brief for [company].  
Use current web research, cite sources, and flag claims you cannot verify.
```

6. Installing In Antigravity Or Another Agent Workspace

If your agent workspace does not support the `SKILL.md` standard directly, use the folders as reusable instruction packs:

1. Add the relevant folder to the project.
2. Put a short pointer in the workspace instructions:

```
For competitor research tasks, follow the workflow in:  
ai-workflows/02-competitor-research-brief/SKILL.md
```

3. Ask the agent to read that file before starting the task.
4. Keep risky actions human-approved, especially anything that deletes files, updates CRM records, sends messages, changes access, or runs scripts.

This matters because autonomous coding and browser agents can have broad access. Use approvals, sandboxing, and source checks. Do not let a research workflow become a permission slip for chaos.

7. Skill Anatomy: What Belongs Inside The File

The technical build-up of a good workflow belongs in the file itself. The included packages use this hierarchy:

Frontmatter

The top of `SKILL.md` names the workflow and describes when it should trigger.

```
---  
name: competitor-research-brief  
description: Produce structured competitor research briefs using current web sources, source quality  
rules, comparison frameworks, and action recommendations.  
---
```

Operating identity

Defines the assistant's role and boundaries.

Good:

> Act as a competitive intelligence analyst for B2B marketing and revenue teams.

Weak:

> Be good at competitor stuff.

We are trying to build a workflow, not summon a vague intern.

Required inputs

Make the assistant ask for missing inputs before doing poor work:

- target company or product,
- competitor list,
- geography,
- buyer segment,
- time horizon,
- output format,
- source constraints,
- decision the user needs to make.

Source hierarchy

Rank source quality before research starts:

1. Company-owned pages: product, pricing, changelog, docs, blog, careers.
2. Official social and press channels.
3. Review sites, app marketplaces, customer communities.
4. Analyst reports and reputable third-party coverage.
5. Forums and social posts, treated as directional rather than definitive.

Framework

The workflow should include the expert method. For competitor research, that means:

- positioning,
- audience,

- offer,
- proof,
- pricing,
- product capabilities,
- channels,
- content strategy,
- sales motion,
- messaging risks,
- action implications.

Output contract

Force a consistent deliverable:

- Executive summary
- Source log
- Comparison table
- Key changes
- Risks and opportunities
- Recommended actions
- Unknowns and follow-up research

QA loop

Before the assistant returns the answer, it should check:

- Did every major claim have a source?
- Are source dates current enough for the task?
- Are uncertain claims labeled?
- Did the output answer the decision the user needed to make?
- Did it avoid pretending scraped or inferred data is verified?

8. Keeping The Workflows Current

Markets change. Models change. Search behavior changes. Your workflow should change too.

Run this refresh prompt monthly:

```
Review this workflow file against the current web, current model behavior, and current user needs.
Find outdated assumptions, missing source types, weak steps, and output sections that no longer help.
Suggest a versioned update with a changelog.
```

For competitive or SEO-heavy workflows, refresh more often:

- after major model updates,
- after search result layout changes,
- when competitors change pricing or positioning,
- when users ask for outputs the workflow does not handle well,
- when the assistant starts producing generic answers.

Generic answers are a maintenance alert. Also a personality flaw in websites, but one crisis at a time.

9. Human Review Rules

Use the workflow output as a decision aid, not a final authority.

Humans should review:

- legal, financial, medical, HR, or public claims,
- competitor claims used in sales materials,
- CRM changes before import,
- outreach copy before sending,
- pricing or product recommendations,
- anything based on weak or conflicting sources.

The assistant should do the repetitive research and structure. The human should own judgment, context, and consequences.

10. Suggested First Use

Start with `02-competitor-research-brief`.

Why: it creates the fastest visible value. Pick three competitors, run the workflow, and ask for:

1. positioning differences,
2. content gaps,
3. offer comparison,
4. proof gaps,
5. three actions your team can take this week.

Then use `01-competitor-content-monitor` to keep the research alive. One-time research dies in a folder. Monitoring makes it useful.

Sources Used For This Guide

- Anthropic Claude Code documentation: skills are `SKILL.md` folders with frontmatter, install locations, optional supporting files, progressive loading, and direct invocation support.
- Agent Skills open standard documentation: skills are portable folders with metadata, instructions, references, templates, scripts, and progressive disclosure.
- OpenAI Academy: Codex skills are process playbooks; plugins connect Codex to external tools and sources.