

How to upskill your marketing team on Claude AI

A practical five-step rollout plan for B2B marketers — followed by a map of where Claude Chat, Cowork, and Code each earn their keep across product marketing, lead generation, and marketing automation.

STEP-BY-STEP ROLLOUT

Five steps to get your marketing team started on Claude AI

- Pick a plan**
 Choose between a Team or Enterprise plan to give everyone access with centralized billing and admin controls.
claude.ai/upgrade
- Block 3-5 hours to experiment**
 Encourage every marketer to spend a few focused hours this week trying Claude on real workstreams — drafts, research, analysis.
- Complete two Anthropic courses**
 Have each team member finish Intro to Claude Cowork and Claude Code 101. Certificates are LinkedIn-ready.
- Open a #learn-claude-ai channel**
 Create an internal Slack or Teams channel so people can trade prompts, wins, and questions as they go.
- Host a demo meeting**
 Schedule a short show-and-tell where each teammate spends a few minutes on what they built or automated.

FROM THERE
Go from individual use to team leverage
 Set up a project-level **CLAUDE.md** file shared across the team so context, voice, and norms travel with every prompt. Then look for repeatable work to hand off to **Claude Cowork scheduled tasks** — for example a weekly CRM hygiene check or a Monday digest of competitor developments.

THE THREE SURFACES

Pick the right Claude for the job

CLAUDE CHAT

The thinking partner

Web and mobile conversation for ideation, drafting, research, and strategy. Best for fast, interactive work — messaging frameworks, positioning docs, and on-the-fly brainstorming.

CLAUDE COWORK

The desktop doer

Desktop agent that reads, edits, and creates files on your machine, runs on a schedule, and connects to tools via MCP. Built for non-developers to automate real work.

CLAUDE CODE

The engineering engine

CLI and SDK for technical marketers and MOPs engineers to build agents, integrate the stack via API, and ship durable automations that run in production.

USE-CASE MATRIX

Where each tool earns its keep

WORKFLOW	● Claude Chat	● Cowork	● Claude Code
ROW 01 Product Marketing	<ul style="list-style-type: none"> Positioning drafts using frameworks like JTBD or April Dunford Messaging house with pillars, proof points, and objection handling Competitive teardowns from public web research Analyst briefings and FAQ generation 	<ul style="list-style-type: none"> Launch decks and one-pagers built from a brief into .pptx/docx Sales battlecards produced across your local files Website copy refresh across a folder of pages Release notes and changelogs auto-assembled 	<ul style="list-style-type: none"> Launch dashboards that pull from product analytics Doc sites and changelogs generated from PR history Custom MCP servers to expose internal PMM data Asset pipelines that auto-generate localized variants
ROW 02 Lead Generation	<ul style="list-style-type: none"> ICP and buyer persona definition from interviews and data Cold email and LinkedIn drafts with variant testing Content hooks tuned to a specific vertical Ad copy and headline options at scale 	<ul style="list-style-type: none"> Prospect list enrichment across .csv and .xlsx files Personalized outreach at scale with per-account research Landing-page variant creation for paid campaigns Weekly pipeline reports scheduled to run and deliver 	<ul style="list-style-type: none"> Lead scoring models wired into HubSpot or Salesforce Form-to-CRM enrichment agents with firmographic lookup Intent-signal aggregators across G2, LinkedIn, and web SDR routing bots that qualify and hand off in Slack
ROW 03 Marketing Automation	<ul style="list-style-type: none"> Workflow design for nurture, onboarding, and re-engagement Sequence copy tuned to funnel stage and persona Trigger logic drafted as pseudocode for MOPs review Taxonomy and UTM standards documented 	<ul style="list-style-type: none"> Scheduled campaign runs that generate, review, and stage assets Cross-tool orchestration across Slack, Gmail, Drive, CRM Weekly performance digests compiled from exports Content calendar upkeep as a recurring agent 	<ul style="list-style-type: none"> Event-driven workflows via webhook into Marketo or HubSpot Custom attribution pipelines joining ad and CRM data Reusable agent skills for the whole marketing org Self-serve internal tools for campaign QA and compliance

3x

Faster asset production when pairing Chat strategy with Cowork execution

24/7

Scheduled Cowork tasks that refresh pipeline, reports, and content

1 API

Claude Code SDK connects the full marketing stack with reusable agents

0 context switches

Strategy, execution, and automation in one model family