

RICK PINA AI ACADEMY • MODULE 2

FROM USER TO **BUILDER**

How to bottle your best work into a skill.

● WATCH THIS FIRST

I am going to type three words:

run new opportunity

Then I am going to walk away from the keyboard.

In the next two minutes, Cowork will do **20 minutes of my setup work.**

Watch what happens. We will explain how after.

THE RESULT

What just happened

From three words, Cowork:

- Built the full opportunity **folder structure**
- Wrote a custom **tracker** with all the deal facts filled in
- Ran our **GO / NO-GO** screen
- Pulled our best matching **past performance**
- Created the deal on our **Monday.com** board

That is not a chat. That is a skill.

THE HOW

Under the hood: what **new-opportunity** actually does

One input. A document, a SAM.gov link, or one sentence from you. Here is everything it does next.

- 1 Reads the solicitation first** and pulls every fact: agency, set-aside, NAICS, due date, value, contract type.
- 2 Builds the folder:** Source Documents, Response, Pricing, Research, and a change log.
- 3 Writes the tracker** (the **CLAUDE.md** file): a quick-reference table with every deal fact already filled in.
- 4 Runs the GO / NO-GO screen:** size, fit, certifications, competition, recommendation.
- 5 Pulls our top 3 to 5 matching past performance:** executed work only, never a bid.
- 6 Creates the deal** on our Monday.com board.
- 7 Hands you a one-paragraph brief:** folder, recommendation, due date, top match.

You typed one thing. It did **all seven.**

THE BIG IDEA

A skill is your best, repeatable work, **packaged.**

You do a task well once. You save it as a skill.

Now the whole team runs it by name, the same way, every time.

Today we open the hood on one skill and learn the four things it does.

WHAT WE WILL COVER

The four layers of a skill

- 1** It is a **command** anyone can run
- 2** It carries our **standards** and our **brand**
- 3** It reaches into our **live systems**
- 4** It calls a **team** and runs on its own

LAYER 1

A command anyone can run

A saved prompt helps one person once.

A skill helps the whole team forever.

The **new-opportunity** skill is a file. Type the name, the file runs.

LAYER 1

Prompt vs skill

A PROMPT

lives in your head and your chat history

```
retype it, slightly  
different, every time...
```

Quality drifts.

A SKILL

lives in a file the team shares

```
/new-opportunity
```

Same steps, same quality, whether Rick or a new hire runs it.

LAYER 1

Why this matters

- The **20 minutes** of folder-and-setup work at the start of every bid is gone.
- Nobody forgets a step, because the steps are written down once.
- The skill does not get tired, distracted, or rushed at 5 PM.

You stopped doing the task. You now **own the task.**

LAYER 2

Our standards and brand, baked in

This is the part people miss.

A skill does not just do steps. It remembers our rules.

Every rule we ever learned the hard way lives inside the skill.

LAYER 2 • THE RULES

The rules live in the skill

Inside **new-opportunity**, written once, enforced every time:

Only cite past performance we **actually executed**. Never a bid.

"ADB" means ADB Companies, not the Asian Development Bank.

Never list a customer POC on a Sources Sought or RFI.

Always run the **GO / NO-GO** screen, even when I am in a hurry.

The AI cannot skip these. They are part of the skill.

LAYER 2 • THE BRAND

The brand lives in the skill too

Our branded skills carry the design system, so output is on-brand automatically:

- Titles in **Montserrat Bold**. Body in **Avenir**.
- No em dashes.
- Inspired ■ #fa5d2a ■ #202d64
- **BLUF** on every section.

Meeting notes, slides, and proposals come out **looking like us**, every time, without anyone reminding the AI.

THE LESSON

Your standards are an asset. So is your brand.

A skill is how you stop re-explaining them and start **enforcing** them.

Train the AI once. It never forgets.

Garbage standards in the skill, garbage out. **Our standards in, our quality out.**

LAYER 3

Reaching into our live systems

Most people upload a file and ask a question.

A skill reaches into the systems where our work actually lives.

It reads live data, acts on it, and writes back.

LAYER 3

What **new-opportunity** touches live

- 01 Drop a **SAM.gov** link or a **file**, it pulls the solicitation off the web or reads the file.
- 02 It reads our **company file** for certifications and past performance.
- 03 It creates the deal item directly on our **Monday.com** board.

No copy-paste. No re-typing the deal into Monday by hand.

LAYER 3

What else is connected

Cowork can be wired into the tools we live in every day:

Monday.com

Deals, leads, tasks

Outlook

Email and calendar

QuickBooks

Financials

Drive & SharePoint

Documents

Otter

Meeting transcripts

Read live → act → write back

The pattern is always the same: read live, act, write back.

LAYER 4

It calls a team and runs on its own

The best skills do not work alone.

They hand the job to specialists, and some run with nobody watching.

LAYER 4

One skill, a whole team

When the deal is a **GO**, **new-opportunity** hands off to specialists:

- A **capture manager** builds the win strategy

- A **compliance analyst** reads Section L and M

- A **pricing analyst** builds the cost volume

- An **editor and brand check** clean the final document

You summoned a proposal team by typing **one command.**

LAYER 4

Built-in guardrails

The skill protects us without being asked:

\$1M+

AUTO SECOND-OPINION
TRIGGER

- On any deal **over one million dollars**, it automatically fires a second-opinion review before I decide.
- It catches high-stakes work even when I **forget** to ask for the check.

The skill **watches our back.**

LAYER 4 • BUILD YOUR OWN

Your second skill: the Morning Update

New-opportunity is a heavy skill. This one is light, and anyone on this team can own it.

IT READS, LIVE

- Today's calendar
- Both inboxes, already triaged (urgent, respond, FYI)
- The Monday.com pipeline and new leads
- The QuickBooks numbers (revenue, gross profit, margin)
- Your task list and every deadline inside 7 days

IT WRITES BACK

- One briefing, saved to your notes
- Pushed to your phone
- Posted to a live dashboard

Fifteen minutes of clicking across five tools every morning, gone.

LAYER 4 • AUTOMATION

It runs before your alarm

Set the schedule once. 6 AM, every day, nobody at the keyboard.

You wake up to the brief already on your phone.

Same pattern as **new-opportunity**: read live, act, write back.

A command runs it on demand. A schedule runs it while you sleep.

Set it once. It runs on its own.

THE RECAP

The four layers, one slide

- 1 A **command** the whole team runs by name
- 2 Our **standards and brand**, baked in and enforced
- 3 A reach into our **live systems**, not just uploaded files
- 4 A **team of specialists** that can run on autopilot

YOUR TURN

Build yours right now

You are not leaving with homework. You are leaving with a skill that runs.

- 1** Fill in the three blanks: your role, your morning, your non-negotiables.
- 2** Paste the prompt into Claude.
- 3** Answer its questions. It builds the skill with you and runs it once while you watch.

Walk out with it running, not written on a sticky note.

THE PROMPT • 1 OF 2

Paste this into Claude

Build me my own Morning Update skill: one command I can run, and that can run on a schedule, so I stop clicking across five tools every morning.

About me: I'm [your role]. The first thing I check most mornings is [what you look at first].

Do this in order:

1. Check which of my tools you can reach: calendar, email, Monday.com, QuickBooks, Drive, Otter. Tell me what is connected and what is not.
2. Interview me one question at a time to design my briefing: what I want to know before I start, which tools matter, what a great briefing looks like, how I want it delivered, what time it runs.
3. Build it as a reusable skill named morning-update. Write the exact steps it runs and the rules it must never break. Mine: [your non-negotiables].

The three **orange blanks** are what make it yours.

THE PROMPT • 2 OF 2

Paste this into Claude

(continued)

4. Run it once right now on today's real data so I can see it, and fix it with me until it is right.
5. Once I approve it, schedule it for **[time]** and deliver it to **[where]**, so it is waiting before I sit down.

Keep our standards: lead with the bottom line, no em dashes, and if a fact is not available say so instead of guessing.

Paste it, answer its questions, and it runs once before you leave.

FROM USER TO BUILDER

You walked in a user, asking the AI for help.

You walk out a builder, with a skill that runs while you sleep.

**Bottle what you do well.
Share it. Let it run.**

That is how a team compounds.