

AI FOR PROFESSIONALS. RESOURCE 06, FREE

Every client tool in your own brand, without repeating yourself.

The six step guide to the practice brand skill. One brand file your AI assistant reads every time, so every calculator, chart, summary and document comes out in your colours, fonts and voice, with the right disclaimer.

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AI Strategy and Adoption. marinaritchie.com. October 2026.

What this is, and what it is not

A brand for a practice is mostly data: colours, fonts, a logo, the disclaimer wording, a few rules on voice. Once an assistant has that in a file, it can apply it to everything without being asked. That file, and the instructions that make the assistant use it, is the whole skill.

What goes wrong without it

- Every tool comes out in whatever colours the assistant picked that day.
- The disclaimer gets paraphrased, shortened, or left off.
- You paste the same brand details into every prompt, and forget half of them.
- Three people in the practice build three different-looking tools for the same client.

What it does

- One brand file: colours as hex values, fonts with fallbacks, logo rules, the exact disclaimer, five lines on voice.
- Instructions the assistant follows so the file is applied to every client-facing output.
- A worked example, filled in, so you can see what good looks like.
- The first recipe: the scenario calculator, with its formula and check figures, ready to adapt to any client decision.
- Where to put the same file in ChatGPT, Gemini and Copilot, so the whole team builds from one record.

What it does not do

- It does not make every assistant produce the same layout. Each designs its own. The colours, fonts, wording and numbers are what stay the same.
- It does not replace your licensee's approval of AI tools, or your record keeping. Illustrations stay illustrations.
- It does not draw a logo. Supply a logo file and the assistant places it. It never redraws one.

What is in the folder

File	What it is
SKILL.md	The instructions the assistant follows. You do not need to edit it.
brand.md.template	The form you fill in. Copy it to brand.md .
examples/marina-ritchie-brand.md	A filled-in example, using the marinaritchie.com design system.
references/scenario-calculator.md	The first recipe: a what-if tool with two scenarios, the retirement example, its check figures, and how to adapt it.
other-assistants.md	Where to put the brand file in ChatGPT, Gemini and Copilot.

Six steps

Twenty minutes the first time. After that, the file does the work.

01 Fill in the brand file

Copy `brand.md.template` to `brand.md` and work through it top to bottom. Hex values for colours, the exact disclaimer wording, five lines on voice. If you only know a colour from your logo, open the logo in any image viewer and use its colour picker. Leave a field blank and the assistant uses the fallback written beside it, and tells you.

02 Install the skill in Claude

Paste the install prompt on the next page into Claude Code. It fetches the six files from marinaritchie.com, puts them in `~/.claude/skills/practice-brand/` and checks that `SKILL.md` sits directly inside that folder, not one level deeper. Start a new session afterwards. The commands, if you would rather run them yourself, are on the next page too.

03 Put the brand file in your other assistants

ChatGPT project instructions or a custom GPT, a Gemini gem, a Copilot agent. The same text in each. The `other-assistants.md` file says exactly what to paste where.

04 Ask for something in your brand

"Build the retire at 60 or 65 calculator in our brand." "Write a client summary of these three scenarios in our brand." The assistant reads the file and applies it.

05 Check the output

Colours and fonts from the file, the disclaimer word for word, the numbers against the check figures in the recipe. If something is off, say "that is not in our brand file" and it will correct it.

06 Keep the file current

When a colour, a font or the disclaimer changes, change `brand.md` and tell the assistant. For a team, share the folder with your filled-in file and everyone installs the same one. One brand file, one set of outputs.

Installing it

Paste this into Claude Code. It fetches the skill files from marinaritchie.com and puts them in place.

Install the practice-brand skill from marinaritchie.com into my personal skills folder.

Download these six files from <https://marinaritchie.com/skills/practice-brand/> keeping the same paths: SKILL.md, README.md, brand.md.template, other-assistants.md, examples/marina-ritchie-brand.md, references/scenario-calculator.md.

Put them in `~/.claude/skills/practice-brand/` and confirm that SKILL.md sits directly inside that folder and not one level deeper.

Then open `brand.md.template` and help me fill in `brand.md`. Ask me for the missing details once, together.

Or run the commands yourself

```
# make the skill folder, with its two subfolders
mkdir -p ~/.claude/skills/practice-brand/examples ~/.claude/skills/practice-brand/references
cd ~/.claude/skills/practice-brand

# download the six files from the website
for f in SKILL.md README.md brand.md.template other-assistants.md
examples/marina-ritchie-brand.md references/scenario-calculator.md; do
  curl -fsSL "https://marinaritchie.com/skills/practice-brand/$f" -o "$f"
done

# check it worked: you should see SKILL.md listed
ls ~/.claude/skills/practice-brand/
```

Rules the skill applies whatever the output

- **No identifiable client data.** If a real name, account number or address is pasted in, the assistant stops and asks for a label such as "Client A" instead.
- **Illustrations are labelled.** Any projection, scenario or calculator carries the disclaimer, even when nobody asks.
- **The numbers are checked.** A tool with a formula shows it, and states the check figures you can test it against.
- **One accent colour.** More emphasis comes from weight, size or spacing, never a second accent.
- **It says what it could not apply.** If the medium cannot carry the font or the logo, the assistant says so in one line.

The first recipe. The scenario calculator, with the retire at 60 or 65 example. On the fictional defaults it gives \$1,058,605 at 60 lasting to age 78, and \$1,359,942 at 65 lasting to age 91. If the tool your assistant builds gives different figures on those inputs, ask it to show its formula. The reference version is at marinaritchie.com/resources/retire-60-or-65.

Compliance, in one paragraph

Do not enter identifiable client information into tools your licensee has not approved. Label on-screen tools as illustrative and keep formal modelling in your usual process. Verify numbers before you rely on them. Your best interests duty, ASIC requirements and your licensee's policies apply whatever tool you use. Keep records as usual. General information only, not legal or compliance advice.