

Module 4

Memory, Projects, Artifacts

Read 4 min · Watch 15 min · Practice 10 min

The Three Context Surfaces

Claude has three ways to keep context. Use them in order from **automatic** to **deliberate**:

1. **Memory** (*auto, always-on*) — facts remembered across separate chats
2. **Projects** (*explicit, scoped*) — persistent workspace with custom instructions + knowledge files
3. **Artifacts** (*ephemeral, per-chat*) — the right-hand pane for structured output

Claude 101 covers Projects + Artifacts deeply. Memory is new (April 2026 GA).

Memory — What It Is

Claude **remembers facts about you and your work** across separate chats.

- **Remembers:** your role, preferences, style notes, patterns it's observed
- **Does NOT remember:** full conversations, attached files, client-scoped Project knowledge

Where to see it: avatar → **Settings** → **Memory** — plain-text list, editable.

Where to turn it off: same pane, toggle at top.

Memory — Three WEO Patterns

1. **Seed Memory with your role on day one** (10 min).

"I'm an SEO strategist at a dental marketing agency. I want markdown tables, tight copy, no 'in today's fast-paced world.'"

2. **Prune weekly.** Friday → skim Memory → delete stale entries.
3. **Don't let Memory swallow client specifics.** Client-specific context belongs in a Project. Memory is cross-chat and leaks into unrelated work.

Memory — What NOT to Let It Remember ⚠️

- **Client names tied to unreleased strategy** — delete
- **Patient-adjacent info** — never
- **Internal compensation / pricing / personnel** — never
- **Anything Level 3 or 4** in WEO data classification (Module 7)

Rule of thumb:

Memory is your scratchpad. Projects are the agency's filing cabinet.

Watch First

Claude 101 — "Organizing Your Work and Knowledge" (~15 min)

anthropic.skilljar.com/claude-101

Covers:

- **Introduction to Projects** — persistent workspaces with knowledge files + custom instructions
- **Creating with Artifacts** — the right-hand panel for structured output
- **Working with Skills** (preview — Module 6 goes deeper)

Why It Matters at WEO

The single biggest Claude efficiency gain for account managers and content strategists is **Projects — one per client.**

- **Without:** re-paste brand guide, audience, voice notes every chat
- **With:** load it all once, every new chat starts with full context

Difference between *"Claude saves me 30 min/week"* and *"Claude saves me 5 hrs/week."*

WEO-Specific: Client-Per-Project Pattern

One Claude Project per major client. Load:

- **Brand guide** — voice, tone, banned words
- **Service offerings** — what this client sells, in their words
- **Target audience doc** — personas, demo + psychographics
- **Prior-year campaign brief** — what ran, what worked
- **Recent blog titles / metas** — so Claude doesn't repeat topics
- **Logo + brand assets** (*if using Claude Design in the same project*)

WEO-Specific: Custom Instructions

The project's "system prompt" — applies to every chat inside:

*You are a senior dental marketing copywriter working on **[CLIENT NAME]**. Always reference the attached brand guide for voice. Always check the prior-campaign brief before proposing new angles. Flag any claim that needs clinical verification as **[VERIFY: ...]**. Never invent statistics — say "data not available" instead.*

Now every new chat has all of this without you re-explaining.

What NOT to Load ⚠️

Even on Team plan, **do not** put any of this into a Claude Project:

- **Real patient records, patient names, PII**
- **Client contracts, payment terms, internal pricing**
- **Unreleased strategic decisions**
- **Anything "Confidential" not cleared by the AI council**

Module 7 has the full rules. Short version: *if you wouldn't email it to a vendor, don't put it in Claude.*

Artifacts — Three WEO Patterns

The right-hand panel for structured output. Watch Claude write, edit in place, iterate without losing conversation.

1. **Campaign brief generator** — Claude drafts in Artifact, you edit directly, export final.
2. **Meta description table** — 10 rows with character counts, copy row-by-row.
3. **Hero-section mockup** — simple HTML of a hero, preview in Artifact, share with design.

Try It (10 min)

1. Complete Claude 101 "Organizing Your Work" (~15 min).
2. **Check Memory.** Avatar → Settings → Memory. Prune stale entries.
3. **Seed Memory** in a new chat: *"For future reference — I'm [ROLE] at WEO, dental marketing agency. I want markdown bullets, tight copy, no corporate jargon."*
4. Create a Project called "**Sandbox — [Your Role]**".
5. Upload one SAFE file. **Not real client data.**
6. Add custom instruction: *"Always end responses with a one-line summary."*
7. Start a chat. Ask about the file. Claude reads automatically.
8. Ask for a table of 5 blog ideas. Watch Artifact pane open. Edit one row directly.

Next: Module 5

Claude Design