

# Installing the Rev-IQ Retention and Customer Success Kit in Claude

How to add the 5 skills in your bundle to your Claude account and run them for the first time. It takes about five minutes.

**What you downloaded:** either the whole bundle as one .zip (Rev-IQ-retention-and-customer-success-kit-claude.zip), or individual skill files from your download page. This is the Claude version. If you have the whole bundle, unzip it first: inside is one .zip per skill, this guide and a README. Upload each skill's .zip to Claude as it is. Don't unzip the individual skill files.

## Which plans work

Claude Free, Pro, Max, Team and Enterprise plans support skills. Skills need code execution switched on.

## Before you start

- **Free, Pro and Max:** go to Settings, then Capabilities, and turn on code execution and file creation, then turn on Skills.
- **Team:** skills are on by default. Check that code execution is on under Settings, then Capabilities.
- **Enterprise:** an organisation owner needs to turn on "Code execution and file creation" and "Skills" in Organization settings first.

## Install the skills

1. If you downloaded the whole bundle, unzip it. On a Mac, double-click it. On Windows, right-click it and choose Extract All.
2. Open Claude in your browser or the desktop app.
3. Go to **Customize**, then **Skills**.
4. Select **+**, then **+ Create skill**, then **Upload a skill**.
5. Choose one skill's .zip file. Upload it as it is.
6. Check the skill is switched on in your skills list. It's private to you until you choose to share it.
7. Repeat for each skill in the bundle. Each one appears separately in your skills list.

## Run them

Start a new chat and ask in plain language. Claude loads the skill when your request matches what it does. To be certain, name it: "Use the Rev-IQ Onboarding Plan Builder skill." Attach files such as a customer list, account notes or a ticket export when asked.

What's in your bundle, and a prompt to start each one:

| SKILL                                 | TRY ASKING                                                           |
|---------------------------------------|----------------------------------------------------------------------|
| Rev-IQ Onboarding Plan Builder        | "Build the onboarding plan and scope document for our new customer." |
| Rev-IQ Customer Health Scorer         | "Score the health of our customer accounts from this list."          |
| Rev-IQ At-risk Account Save Plan      | "This account is at risk of churning. Build a save plan."            |
| Rev-IQ Quarterly Review Call          | "Prep a quarterly review call with this customer."                   |
| Rev-IQ Support Tiers and SLA Designer | "Design support tiers and SLAs from this ticket export."             |

## If something doesn't work

|                             |                                                                                                                                    |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| The upload is rejected      | Upload the original .zip from rev-iq.ai without unzipping or re-zipping it. Make sure you downloaded the Claude version.           |
| The skill doesn't start     | Name it in your message, and check it's switched on under Customize, then Skills.                                                  |
| Calculations don't run      | Code execution is off. Turn it on under Settings, then Capabilities, or ask your organisation owner.                               |
| The bundle zip won't upload | The bundle file holds several skills, so it can't be uploaded in one go. Unzip it first, then upload each skill's .zip on its own. |

Still stuck? Email [joel.smith@rev-iq.ai](mailto:joel.smith@rev-iq.ai) with your order email, the skill name and platform.

## Your licence and updates

Your purchase covers use within one business, including your team. Please don't resell, share outside your business or redistribute the files. Updates are included for 12 months from purchase: use the link on your download page to get the latest version.

## Your data

The skills run inside your own Claude account. Nothing you enter or upload is sent to Rev-IQ. Anthropic's terms, your plan's data settings and your organisation's policies apply to what you share with Claude, so remove anything you're not comfortable sharing, such as personal contact details.

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