

POINTER

INSTALLATION GUIDE

Buyer Research Tools

This folder gives you two ways to add the buyer research workflow to an AI tool. Use the Agent Skill folder if your tool supports Agent Skills. Use the custom instructions file if your tool works through project, assistant, or Gem instructions instead.

Both options help sellers prepare for buyer conversations with source-backed commercial hypotheses, not generic account summaries.

AGENT SKILLS TOOLS

Install the skill folder

`buyer-insight-research/`

or

INSTRUCTION-ONLY TOOLS

Use the standalone prompt

`buyer-insight-custom-instructions.md`

What Is In The Package

<code>buyer-insight-research/</code>	The installable Agent Skill folder.
<code>buyer-insight-research/SKILL.md</code>	The Agent Skill endpoint. Compatible tools use this to decide when to activate the skill.
<code>references/seller-context.md</code>	The seller's company, product, point of view, proof points, fit rules, and caution areas.
<code>references/research-method.md</code>	The research framework and signal categories.
<code>assets/buyer-insight-brief-template.md</code>	The output format the agent should follow.
<code>agents/openai.yaml</code>	Optional Codex UI metadata.
<code>buyer-insight-custom-instructions.md</code>	A standalone prompt-style version. This file is not part of the installable skill; use it only for tools that need a single custom-instructions document.

First-Time Setup

Before using the skill for real research, edit `buyer-insight-research/references/seller-context.md`.

At minimum, fill in:

- Company name.
- What you sell.
- Who you sell to.
- Your point of view.
- Where you should not overclaim.

You can also adjust `buyer-insight-research/references/research-method.md` if your market, category, region, or sales motion needs different research signals.

Typical Workflow

After setup, just ask naturally.

Research Atlassian.

Prep me for a CFO meeting at Canva.

Build a point of view on Telstra for a platform consolidation conversation.

Research `https://example.com` for a VP People discovery call.

The agent will infer reasonable defaults from the company name, URL, buyer role, or meeting context. It should only ask a clarifying question if it can't identify the company, the name could refer to multiple companies, or the seller context is too blank to connect buyer signals to your point of view.

Install In Codex

The easiest way is to have Codex install the skill for you.

1. Unzip or drop this package somewhere Codex can access.
2. Start a Codex session in that folder, or point Codex to the folder path.
3. Ask Codex to install the skill.

PERSONAL SKILL PROMPT

Install the `buyer-insight-research` skill from this package.

Make it available as a personal Codex skill unless I say otherwise.

After installing it, tell me where you put it and how to test it.

PROJECT-ONLY PROMPT

Install the `buyer-insight-research` skill from this package for this project only.

Put it in the project's `.agents/skills` folder.

After installing it, tell me where you put it and how to test it.

Codex should install the `buyer-insight-research/` folder as the skill. Once installed, test it with `$buyer-insight-research Research Atlassian.`

Reference: **Codex skills docs.**

Install In Claude Code

The easiest way is to have Claude Code install the skill for you.

1. Unzip or drop this package somewhere Claude Code can access.
2. Open Claude Code in that folder, or point Claude Code to the folder path.
3. Ask Claude Code to install the skill.

PERSONAL SKILL PROMPT

```
Install the buyer-insight-research skill from this package.  
Make it available as a personal Claude Code skill unless I say otherwise.  
After installing it, tell me where you put it and how to test it.
```

PROJECT-ONLY PROMPT

```
Install the buyer-insight-research skill from this package for this project only.  
Put it in the project's .claude/skills folder.  
After installing it, tell me where you put it and how to test it.
```

Claude Code should install the `buyer-insight-research/` folder as the skill. Test whether Claude sees it by asking `What skills are available?`

Reference: [Claude Code skills docs](#).

Use With Other Agent Tools

If the tool supports the open Agent Skills format, point the agent at this package and ask it to install the `buyer-insight-research/` folder wherever that tool expects skills.

```
Install the buyer-insight-research Agent Skill from this package.  
Use the standard skill location for this tool.  
Keep the references and assets folders with the skill.  
After installing it, tell me how to invoke or test it.
```

The required entrypoint is `buyer-insight-research/SKILL.md`. Keep the `references/` and `assets/` folders with it.
Reference: [Agent Skills specification](#).

Use The Custom Instructions File

If your tool does not support Agent Skills, paste `buyer-insight-custom-instructions.md` into the tool's project instructions, custom assistant builder, agent prompt, or saved system prompt area. Then fill out the Seller Company Context section inside that file.

This version is less modular, but it's easier to paste into tools that only support a single instruction document.

Claude

For Claude chat, use a Claude Project with project instructions. If you're using Claude Code, prefer the Agent Skill install path.

1. Create a Claude Project for buyer insight research.
2. Add the custom instructions file as the project's instructions.
3. Fill out Seller Company Context.
4. Start target-account research chats inside that Project.

Reference: [Claude Projects docs](#).

ChatGPT

Use a dedicated ChatGPT Project rather than account-level custom instructions, unless you want this behavior in every chat.

1. Create a ChatGPT Project for buyer insight research.
2. Add the custom instructions file to Project instructions.
3. Fill out Seller Company Context.
4. Keep buyer research chats inside that Project.

Reference: [ChatGPT Projects docs](#).

Gemini

Use the custom instructions file to create a dedicated Gemini Gem.

1. Create a new Gem for buyer insight research.
2. Paste in the custom instructions file.
3. Fill out Seller Company Context.
4. Use that Gem for target-account research.

Reference: [Gemini Gems docs](#).

What Sellers Should Expect

The output is a meeting-prep brief, not a company profile. It should help the seller walk into the conversation with a commercial read they can test with the buyer.

Each brief should include:

1. Executive read.
2. Buyer tension.
3. Three point-of-view hypotheses.
4. Best opening question.
5. Discovery path.
6. Risks and watchouts.
7. Source notes.

A good brief gives the seller a useful opening perspective while leaving room for the buyer to correct, sharpen, or reframe the read.