The Sales Automation Playbook for Claude

If you can prompt Claude, you can automate sales.
No code. No builder to learn.

INSIDE THIS PLAYBOOK

One real workflow per chapter: the story, the exact prompt, and the Skill behind it.

New chapters added as we research more workflows.



Written by Frank Tuerling
Founder & CEO, FlowMate

CONTENTS

One workflow, one chapter.

Every chapter takes a real sales workflow and walks through it the way a colleague would explain it: the story, the exact prompt, and the Skill behind it.

01 **Introduction** 3
Why build sales automation directly in Claude, and what that replaces.

02+ **Use cases** Grouped by category. One per page.

OUTBOUND & PROSPECTING
- #2.1 Signal-based lead gen 4
- #2.2 Instant reply response 5
- #2.3 In research

INBOUND & LEAD CAPTURE
- #3.1 Auto-Qualify with Skills 6
- #3.2 Event leads into CRM deals 7
- #3.3 In research

MEETINGS & FOLLOW-UP
- #4.1 Meeting prep on booking 8
- #4.2 Follow-up after a sales call 9
- #4.3 In research

PIPELINE & DEALS
- #5.1 Handover on signature 10
- #5.2 In research

CUSTOMER & RENEWALS
- #6.1 Check-in on day 30 11
- #6.2-3 In research

Pages are added as each use case is built and tested with real sales teams.

Why build sales automation directly in Claude

If you're in sales or growth, you already know the routine. Your day is spread across a dozen apps, your outbound tool, your CRM, your inbox, Slack. You've probably tried a workflow builder like Zapier, Make, or n8n to tie them together, and found it needs more engineering know-how than your team has sitting around. Then you got Claude for your team. That already changed how you work, and there's a second change most teams haven't made yet: using it for sales automation too.

01 Claude already knows you, and keeps learning

The newest alternative is an AI agent built just for sales. It sounds tempting, something that qualifies and responds on its own. But it starts from zero. You teach it your process, your terminology, your voice, from scratch, inside a tool that's never seen how your team works. Claude doesn't have that problem. It already has your Skills, your Memory, your Projects, and it keeps learning the more your team uses it. Automating a workflow means pointing Claude at what it already knows, not training a new AI somewhere else.

02 No workflow specialist, no engineer

A visual builder in a tool like Zapier, Make, or n8n still needs someone fluent in that builder, a specialist. Wiring things together through APIs needs someone who can handle the connections and the authentication, an engineer. Both are dependencies most sales leaders don't have sitting next to them. Claude collapses both into one skill you already have: writing a clear sentence. If you can describe what should happen, you can build it.

03 One platform, not another one

Every additional tool you bring in, a workflow builder or a dedicated AI agent, is another subscription and another tab, sitting on top of Claude, not instead of it. And it doesn't stop at cost. If your support team and your ops team already run on Claude, sales workflows aren't sales-only, they're customer workflows, and a customer crosses every one of those teams. A tool built for one team stops at that team's edge. Claude doesn't.

04 It gets better without you doing anything

A workflow built in a vendor's platform improves when that vendor ships an update, on their timeline. A workflow described to Claude improves every time Claude itself improves, because the logic lives there, not in a separate product waiting on someone else's roadmap.

05 Your logic, not the platform's

Build a workflow inside someone else's tool, and it only exists there, locked into their menus and their settings. Leave that tool, and you start over from scratch. Describe the same workflow to Claude, and it's a paragraph you wrote yourself, something you understand and could hand to anyone.

WHAT'S AHEAD

Each chapter that follows takes one real sales workflow and walks through it the way a colleague would explain it, not the way a product manual would. You'll see the exact prompt, what you can already do with Claude alone today, and what changes once it runs entirely on its own.

The playbook follows your sales cycle, from first outreach to renewal. New workflows are added as we build and test them with real sales teams.

Signal-based lead generation

#2.1

The best leads show interest first. They comment on a post, change jobs, raise a round or ask for help on Reddit, and most outbound never notices. By the time a cold list reaches them, they've often chosen someone else.

WHAT HAPPENS

The moment a signal comes in, like a comment on a LinkedIn post you track, Claude reads it and the person's profile and scores fit and intent against your ICP, using your team's own Lead Qualification skill. If it's a strong fit, Claude adds the person to your outbound sequence, where the email is enriched and the series starts. Everyone else is logged with the reason.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your signal source and outbound tool to Claude, and you can already ask it to check who engaged with a post, score them, and add the good ones to a sequence. Real actions, not just advice, whenever you're there to ask.

With FlowMate, automatically

The same scoring, but nothing waits for you. FlowMate reads every signal, scores the person against your ICP, and adds only the strong fits to your sequence. The rest are logged with the reason.

WORKS WITH THE SIGNAL SOURCES YOU ALREADY USE

More added as we confirm them.

When someone comments on a LinkedIn post I track, read the comment and profile, score them with my Lead Qualification skill, and add the strong fits to my outbound sequence. Log the rest with the reason.

Sonnet 5 Medium

Go deeper. See exactly how this runs, step by step, including the version where you review every lead before the sequence starts: **flowmate.io/claude/workflow/signal-based-lead-generation**

Instant reply response

#2.2

If you're in sales or growth, you already know speed wins. A lead is at their most engaged the moment they hit reply, not whenever someone next happens to check the inbox, and by then they've often already moved on.

WHAT HAPPENS

The moment a lead replies, Claude reads it using your team's own Lead Qualification skill. If it's a real sign of interest, Claude pulls together what it knows about the lead and creates the deal in your CRM with the collected data. From there, Claude either answers right away in your own voice, or flags it to the right rep with a draft ready to check before it sends.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your CRM and outbound tool to Claude, and you can already ask it to check for a new reply, qualify it, and create the deal. Real actions, not just advice, whenever you're there to ask.

With FlowMate, automatically

The same reply, but nothing waits for you. FlowMate creates the deal, the company, and the contact record from what it finds, enriches all three, and sends the response or drafts it for your rep, the moment the reply lands.

WORKS WITH THE OUTBOUND TOOL YOU ALREADY USE



When a lead replies in my outbound tool, qualify them with my Lead Qualification skill, create a deal in my CRM with what you find, and respond using my Lead Response skill or notify the rep with a draft to approve.

+ Sonnet 5 Medium

Go deeper. See exactly how this runs, step by step, including the version where a rep reviews every response before it sends: **flowmate.io/claude/workflow/instant-reply-response**

Auto-Qualify Leads with Skills

#3.1

You get 100 leads today. All you actually know about most of them is a name and an email. Somewhere in there are 10 worth a rep's time this week, and no way to tell which ones without digging through each one by hand.

WHAT HAPPENS

The moment a form fill comes in, Claude enriches the record with what it can find, scores fit and intent against your ICP using your own Skills and Memory, creates the Contact and Company in your CRM with everything it found, and opens a task for the account owner with a research summary and a recommendation.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your form tool and CRM to Claude, and you can already ask it to check for new form fills, enrich and score them, and write the result back. Real actions, not just advice, whenever you're there to ask.

With FlowMate, automatically

The same enrichment and scoring, but nothing waits for you. The moment a form fill comes in, FlowMate builds out the Contact and Company, scores fit and intent, and opens a task with the research and recommendation already attached, on the right rep's desk before you've even seen the lead yourself.

WORKS WITH THE FORM TOOL YOU ALREADY USE

More added as we confirm them.

Claude, watch for new form fills on Typeform. When one comes in, enrich the record with what you can find, score fit and intent against my ICP, use my existing qualifying Skill, create the Contact and Company in our CRM with everything you found, and open a task for the account owner with your research summary and recommendation.

Sonnet 5 Medium

Go deeper. See exactly how this runs, step by step: **flowmate.io/claude/workflow/lead-qualification**

Event Leads into CRM Deals

#3.2

You come back from the event with 40 leads in a spreadsheet and a full inbox. The list waits for a free afternoon, and by then the people you met have moved on.

WHAT HAPPENS

You hand Claude the file. For each person, Claude enriches the record, scores fit against your ICP using your team's own Skills and Memory, and checks your CRM for who is already there. It matches people to the right contacts and companies by judgment, not just by exact email or domain, so a missing email or a different domain doesn't create a duplicate. Where a lead is worth it, Claude creates the deal with contact and company linked. Everyone else is logged with the reason.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Attach the spreadsheet, and Claude works through the leads contact by contact. You get the enriched and scored data back in the chat or in a file. Checking your CRM and creating the deals is still up to you.

With FlowMate, automatically

The same batch, but nothing waits for you. FlowMate checks whether each contact already exists, enriches and scores it, and creates the deal with all related data, contact and organization linked. The follow-up can be automated as well.

WORKS WITH THE TOOLS YOU ALREADY USE

More added as we confirm them.



Go deeper. See exactly how this runs, step by step: **flowmate.io/claude/workflow/event-leads-to-crm-deals**

Meeting prep on booking

#4.1

Every new meeting on your calendar means the same 15 minutes beforehand. Pull up the company site, check LinkedIn, guess whether they're actually a fit, then try to remember to log it somewhere.

WHAT HAPPENS

The moment someone books time with you, Claude researches the company using your own Skills and Memory, and checks it against your ICP. It logs the fit score in your CRM and posts a briefing to Slack, before you've even opened your calendar.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your calendar, CRM, and Slack to Claude, and you can already ask it to research a new booking, check it against your ICP, and log the result. Real actions, not just advice, whenever you remember to ask before the call.

With FlowMate, automatically

The same research, but nothing waits for you. The moment someone books time, FlowMate checks the company against your ICP, updates your CRM with the fit score, and posts the briefing to Slack, before you've even opened your calendar.

WORKS WITH THE BOOKING TOOL YOU ALREADY USE

More added as we confirm them.

When a meeting gets booked on Calendly, research the company, check it against my ICP, update HubSpot with the result, and post a briefing to Slack.

Sonnet 5 Medium

Go deeper. See exactly how this runs: **flowmate.io/claude/workflow/meeting-prep-on-booking**

Follow-up after a sales call

#4.2

The best follow-up goes out while the call is still fresh. Today the notes go into Claude by hand, and the follow-up often waits until the next meeting is over. By then, the energy from the call is gone.

WHAT HAPPENS

When a sales call on Zoom ends, the transcript is pulled and handed to your Follow-up Skill. It summarizes the call, defines the next steps you agreed on, and logs notes and tasks to the deal in your CRM. A follow-up drafted in your voice waits in Gmail, and nothing goes out until you approve it.

This isn't the same as a workflow tool firing a template. A Zap can pass a transcript to an AI step and get a generic recap, but the prompt was fixed the day someone built it. It doesn't know how you write, what you usually commit to after a demo, or what's already on the deal. Your Follow-up Skill makes those calls using the Memory and Skills you've already built in Claude.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect Zoom, your CRM, and Gmail to Claude, and you can already paste in a transcript and ask for a recap, tasks, and a draft. Real actions, not just advice, whenever you find the time after the call.

With FlowMate, automatically

The same follow-up, but nothing waits for you. The moment the call ends, the transcript becomes notes and tasks on the deal and a draft in your voice. You review it, approve it, and it goes out.

WORKS WITH THE TOOLS YOU ALREADY USE

Needs transcription switched on in your call tool. In Zoom, that means cloud recording with audio transcript enabled.

When a sales call on Zoom ends, pull the transcript, draft a follow-up in my voice with the next steps we agreed on, and send it once I approve. Then update the deal in my CRM.

Sonnet 5 Medium

Go deeper. See exactly how this runs: **flowmate.io/claude/workflow/follow-up-after-sales-call**

Handover on signature

#5.1

The contract is signed, and the clock is running. 48% of customers abandon onboarding if they do not see value quickly (OnRamp, 161 CS leaders), yet the Customer Success team only gets a CRM record, not the story.

WHAT HAPPENS

The moment the contract is signed, Claude reads it together with the deal in your CRM, using your team's own Customer Handover skill. It works out what the customer wants to achieve and what was promised, briefs your CS team in Slack, and starts the onboarding in Intercom. If contract and CRM disagree, it flags the deal owner instead.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your signing tool, CRM, Slack and Intercom to Claude, and you can already ask it to read a signed contract and write the handover. Real actions, not just advice, whenever you remember to ask.

With FlowMate, automatically

The same handover, but nothing waits for you. FlowMate reads the signed contract and the deal, briefs your CS team in Slack and starts the onboarding in Intercom, the moment the signature lands.

WORKS WITH THE SIGNING TOOL AND CRM YOU ALREADY USE

Copy prompt

```
When a contract is signed in my signing tool, read it and the deal in my CRM, write the handover with my Customer Handover Skill, brief the CS team in Slack and start the onboarding in Intercom.
```

Sonnet 5 Medium

Go deeper. See exactly how this runs, step by step: **flowmate.io/claude/workflow/handover-on-signature**

CHAPTER 06 CUSTOMER & RENEWALS

Check-in on day 30

#6.1

You spent months winning this customer. Who checks in on day 30? It is the task everyone means to do and nobody owns, and it falls in the month most customers decide whether to stay.

WHAT HAPPENS

Thirty days after the contract is signed, Claude reads the deal in your CRM, the email thread and the conversations in Intercom, using your team's own Customer Check-in skill. It works out whether the customer is on track, stuck or at risk. A check-in in your voice waits in Gmail for your approval, written for where the customer actually is. If the account needs a call, the owner gets the reason in Slack.

TWO WAYS TO RUN THIS TODAY

With Claude and MCP, manually

Connect your CRM, Gmail, Intercom and Slack to Claude, and you can already ask it to review a customer's first 30 days and draft the check-in. Real actions, not just advice, whenever you remember to ask.

With FlowMate, automatically

The same review, but nothing waits for you. On day 30, FlowMate reads the account, decides where the customer stands, drafts the check-in in Gmail and alerts the owner in Slack when the account needs a call.

WORKS WITH THE CRM AND SUPPORT TOOL YOU ALREADY USE

More added as we confirm them.

Copy prompt

30 days after a contract is signed, review the customer in my CRM, our emails and Intercom, decide with my Customer Check-in Skill whether they are on track, stuck or at risk, draft the check-in in Gmail for my approval and alert the owner in Slack if the account needs a call.

Sonnet 5 Medium

Go deeper. See exactly how this runs, step by step: **flowmate.io/claude/workflow/check-in-on-day-30**

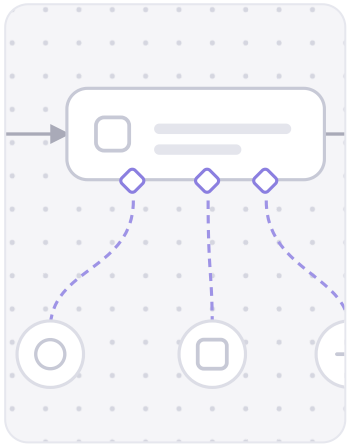
FlowMate

If you can prompt Claude, you can use FlowMate.

No builder to learn, no scripts to maintain. Describe the outcome once. FlowMate runs it across every app you work in.

Prospect Qualification Skill
Qualifies, scores, tags every contact.

Your Claude Memory and Skills, already built in.



Claude

"When a new lead comes in, create the deal and notify the rep."

Skip the builder. Just describe it.

LIVE

Always on.
Even when you're not.

All AI platforms.
One
FlowMate account.

EC	Emma Carter	14
JR	Julia Rossi	10
SP	Sami Patel	8

Share Flows and Agents with your team.

Start free → at flowmate.io

This is a start.
Not a finished playbook.

New workflows get added as we build and test them with real sales teams. This is where they land as they're ready.

Read the always-current version online. New chapters appear there first, at **flowmate.io/claude/workflows/sales-automation-playbook**

GET STARTED

The Automation Pioneer Program is live.

Up to 100 spots, full Team plan free for 90 days, 25% lifetime discount once you're on a paid plan, no credit card required.

Start free →

SEE EVERY WORKFLOW

Browse the full, growing library at **flowmate.io/claude/workflows/gtm**

WHAT SHOULD THE NEXT CHAPTER BE?

We're building this from what we hear from sales teams actually running these workflows. If there's one you'd want written up next, tell us, the same way you got this playbook: comment or reach out, and it might be the next page.