FREE RESOURCE · ORLIA STUDIO

Build Your Lead Engine in Claude

A 4-step setup. Each step is one prompt you paste into Claude. Answer the questions it asks, and it builds the next piece.

BEFORE YOU START

- Run this inside **Claude Cowork or Claude Code**. The steps that use subagents rely on Claude's Task tool, which lives in those apps.
- Run all four steps in the **same conversation** so your list carries across. Once Step 3 builds your tracker, that becomes your source of truth.
- **One rule that never changes:** every email lands in your Gmail drafts for you to review. Nothing ever sends on its own.

01

SETUP 1

Find your businesses

Copy and paste into Claude

```
I'm building a lead engine and I need to build my list of target businesses first.

Before you start, ask me two things:
1. What kind of business am I trying to reach?
2. Which area? Give me the country, state, and city or suburb.

Once I answer, do this:

1. Connect Apify if it isn't already:
   - Open the connectors menu in Claude, search for Apify, click Connect, sign in, approve
the permissions.

2. Use the Apify MCP to run the actor compass/crawler-google-places:
   - Search term: the business type I gave you
   - Location: the area I gave you
   - Pull around 25 to 30 results to start
   - Capture for each: name, website, phone, address, category, rating

3. For every business that has a website, use subagents (the Task tool, not an external API
key) in batches, each subagent handling about 5 businesses. Each subagent runs the Apify
actor apify/website-content-crawler on that business's website and returns a 2 to 3
sentence summary of what the business does, plus anything specific I could reference in an
email.

4. Collect everything into one table and show it to me:
   Business name | Website | Phone | Suburb | Category | Rating | Website summary

Do not contact anyone. This step only builds the list. Keep the full list in this session
for the next steps.
```

02

SETUP 2

Verify your contacts

Copy and paste into Claude

```
Now I need the decision-maker contact and a verified email for each business on my list.

First ask me: do I want to use Apollo or Hunter.io?

If it isn't connected, walk me through it:
1. Open the connectors menu in Claude
2. Search for the tool I picked
3. Click Connect and sign in with my account
4. Approve the permissions
5. I'll tell you when it's connected

Once connected, for each business on my list from Setup 1:
1. Find the best contact (owner, director, or manager) and their email
2. Verify the email is deliverable (mark it valid, risky or catch-all, or invalid)
3. Add these columns to my table: Contact name | Role | Email | Email status

Use subagents (the Task tool, not an external API key) in batches to enrich the list
faster. Each subagent handles a batch and returns the contact and verified email.

Skip any business where you can't find a valid email and tell me which ones you skipped.
Don't email anyone yet.
```

03

SETUP 3

Track every lead

Copy and paste into Claude

```
Now I want every lead logged in one place so nothing gets lost.

First ask me: do I want to use Google Sheets or Notion?

If it isn't connected, walk me through it:
1. Open the connectors menu in Claude
2. Search for the tool I picked (Google Drive for Sheets, or Notion)
3. Click Connect and sign in
4. Approve the permissions
5. I'll tell you when it's done

Once connected, create a new tracker called "Lead Engine" with these columns:

Business name | Website | Suburb | Contact name | Role | Email | Email status | Business
summary | Personalisation line | Draft status | Sequence step | Last contacted | Reply
status | Next action

Then load every lead from Setups 1 and 2 into it, and set Draft status to "not started" for
each row.

One rule that never changes: every email this system produces goes into my Gmail drafts for
me to review. Nothing is ever sent automatically. We'll fill in the draft columns in the
next step.
```

04

SETUP 4

Write and draft the emails

This prompt interviews you first, writes one email, iterates until it sounds like you, then turns that into a reusable skill every future email follows.

Copy and paste into Claude

I'm turning my leads into personalised cold email drafts. I want them to sound like me and hit one sharp angle, not read like a template. Before you write a single word, interview me.

Ask me these a few at a time and wait for my answers. Push back if an answer is vague.

Your offer

1. In one plain sentence, what do you build or do?
2. Who exactly is it for? Name the type of business and the specific person inside it who feels the problem.
3. What is the one result they get? Describe the outcome they feel, not the feature.

The pain (this is the most important part)

4. Describe the exact moment your ideal client feels this problem. A real, recognisable scene, not a statistic.
5. Is this mainly a revenue problem or an efficiency problem? If there's any honest way to frame it as revenue, tell me.

Proof

6. What can I honestly claim as proof? Past clients, a specific result, years in it, or a narrow focus. Only give me what's true. Never invent clients or numbers for me.

Voice

7. How do I want to sound? Give me one line in that voice as a sample.
8. Any words, phrases, or hype I never want in my emails?
9. My exact sign-off block (name, title, business, contact details)?

The ask

10. Soft close or direct meeting ask?
11. Am I offering anything free, or is it paid from the start?
12. Subject line style: plain and human, or a little curiosity?

Once I've answered, do this:

1. Take the FIRST business from my Setup 1 list. Write ONE cold email:
   - around 80 to 120 words
   - open with the pain scene as a real pattern, not "imagine" and not a stat
   - one clear angle tied to something specific about their business
   - a personalisation line that proves I read past their homepage
   - my exact sign-off
   - no em dashes, no hype words, no "I'd love to" or "hope this finds you well"

2. Show me the draft. We iterate until I say it's right.

Once I approve the sample, build me a reusable cold email skill with these sections:
- Core insight: the one painful scene, and why it lands
- Hard rules: my banned words, no em dashes, no hype, no fabricated proof, my greeting and sign-off
- Input needed per business: which personalisation hook to pull from each website summary
- Email structure: which parts stay fixed and which change per business
- Worked example: the email I just approved
- Final check: a short list to run before every email goes out

Then use subagents in batches to write the rest of the list. Each subagent takes one business plus its website summary, follows the skill, and returns the personalisation line and the full email.

For each finished email, create a draft in Gmail. Never send. Update the tracker: Draft status to "drafted", Sequence step to "cold email", Last contacted to today.

When replies come in, flag them and stop that sequence. I review, approve, and send every draft myself.

OPT

OPTIONAL

Run it every morning

Skip this if you want to keep the guide at four steps.

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```
I want this lead engine to run on a schedule every weekday morning at 9AM.

Set up a recurring task that:
1. Checks my tracker and Gmail for any new replies, flags them, and stops those sequences.
2. Picks the next batch of leads that are still at "not started".
3. Runs Setups 2, 3, and 4 on that batch: verify the contact, log the lead, and build the Gmail draft.
4. Leaves everything in my drafts for me to review, approve, and send.

Never send anything automatically. Just have the drafts and the flagged replies waiting for me each morning.
```