Guide tool

Prompt pack: 32 prompts for your CRM agent

This pack has 32 prompts for working in a CRM through an AI agent, grouped by routine. Copy one, change the parts in square brackets, and paste it into Claude, ChatGPT, Cursor, Codex or any assistant connected to your CRM.

From the guide “Working with a CRM through your AI agent” at mcpcrm.app/guide/. The latest version of these prompts is at mcpcrm.app/guide/prompts/.

The tool names in these prompts are mcpcrm’s, such as `search_records` and `convert_lead`, and the statuses are the standard ones, such as Not Contacted and Closed Won. Another CRM’s MCP server has tools of its own, and your agent will use them. Prompts marked with a product name need tools from that product.

Set up and check

Use these when an agent connects for the first time, or to a new workspace.

Check what you can do

Before we start, call list_workspaces if you have it, then whoami. Tell me which workspaces you can use, which CRM user you are, and what your role lets you read, create, change and delete in each module. Change nothing yet.

Learn the fields

Call describe_module for Leads, Contacts, Organisations and Opportunities. Summarise the required fields, the picklist values for lead status, lead source and sales stage, and any custom fields. Use only these fields and values from now on.

Read the rules first

Read the rules for this workspace and the CRM manual you were given when you connected. Tell me in five lines what you must never do here, and ask me about anything that is unclear before you change a record.

Check a CRM set up from a mailbox

The Organisations, Contacts and Leads in this workspace were imported from my mailbox today. Find Organisations with no Contacts, Contacts with no Organisation whose email is not free mail, and two Organisations with the same website. List each with its id and what you suggest, ask me before changing anything, and change nothing yet.

Inbox to CRM

New enquiries and customer emails go into the CRM on the day they arrive.

Turn an enquiry into a lead

Here is an enquiry that arrived today: [paste the email or form]. Search the CRM for the sender by email address, then phone number, then company name. If they are new, create a Lead with status Not Contacted, the right lead source and a short description of what they asked for. If they already exist, add a comment to their record instead. Then create a Task for me to reply by [date].

Log the day’s emails

Uses tools from mcpcrm Solo and mcpcrm Team

Here are the emails I sent and received today about customers: [paste them]. For each one, find the Contact, the Organisation and any open Opportunity, and log the email with log_email, linked to them. Do not create records for people you cannot find. List them for me instead.

Pick CRM updates out of the inbox

Read these messages from my inbox: [paste them]. Pick out anything that changes a customer record, such as a new phone number, a new contact at a company, a request for a quote or a meeting time. Show me the changes you propose, and make them only after I say yes.

Follow-ups

One list of what needs a reply or a next step today.

Daily briefing

Give me my briefing for today. Tell me, in this order: my overdue Tasks and the ones due today, new emails that need a reply, Opportunities whose close date has passed or that have not changed for 14 days, and my meetings for the next two days. Keep it short, end with the three things I should do first, and change nothing.

Today’s follow-up list

Make my follow-up list for today. Find Tasks assigned to me that are due today or overdue and are not Completed, Opportunities whose expected close date has passed, and Leads with status Attempted to Contact and no activity for 7 days. Group them by customer, put the most valuable first, and change nothing.

Draft follow-up emails

For each Opportunity in the sales stage Proposal/Price Quote with no email for 10 days, draft a short follow-up email to its main Contact. Use the last email and the comments for context, keep it under 120 words, and save each one as a draft for me to read. Send nothing.

Leads with no reply

List Leads with status Attempted to Contact whose last activity is more than 14 days old. For each, suggest one next step: try another channel, set the status to Contact in Future with a date in a Task, or close it as Lost Lead with a reason. Wait for my choice before you change anything.

Tidy overdue tasks

Find my Tasks that are more than 7 days overdue. For each, tell me what it was for and suggest a new due date, the status Deferred, or Completed if the history shows it was done. Update them only after I confirm, and add a comment wherever you change a due date.

Pipeline review

A weekly look at open deals, with amounts and close dates kept current.

Weekly pipeline review

Review all open Opportunities. Show a table by sales stage with the number of deals and the total amount. Then list the deals that need attention: a close date in the past, no activity for 14 days, no amount, or no main Contact. Change nothing. This is a report for me.

Fix close dates and amounts

For the Opportunities you flagged, propose a new expected close date and amount from the latest emails and comments. Show me the value before and after for each one. When I approve, update them and add a comment on each saying why it changed.

Close a deal as won or lost

Opportunity [name] is [won or lost]. Set its sales stage to Closed Won or Closed Lost, set the expected close date to today, and add a comment with the reason: [reason]. If it is won, create a Task for the handover to [person]. If it is lost, list its open Tasks so that I can close them.

Next month’s forecast

List the Opportunities with an expected close date next month, with amount, sales stage and probability. Give me the total, and a second total weighted by probability. Point out any deal whose stage and probability do not match.

Meetings and calls

Notes become events, comments and tasks while the details are fresh.

Meeting notes to records

Here are my notes from a meeting with [company] today: [paste notes]. Record the meeting as an Event of type Meeting with status Held. Add a comment with what was decided, and create a Task for each next step with an owner and a due date. Change the Opportunity’s stage or amount only if the notes say so. List everything you changed.

Log a call

I called [name] at [company] today. We agreed [summary]. Log it as an Event of type Call with status Held, linked to the Contact and the Opportunity, and create a Task for my next step: [next step] by [date].

Prepare for a meeting

I am meeting [company] on [date]. Give me a one-page brief from the CRM: the contacts, open Opportunities with stage and amount, the last five emails and comments, open Tasks and Tickets, and anything they asked for that we have not done. Change nothing.

Leads and qualification

From a new lead to a qualified deal, or to a lead closed with a reason.

Qualify a lead

Look at Lead [name]. From its emails, comments and website, tell me what we know about their need, who decides, their budget and their timing, and what is missing. Suggest a status: Contacted, Cold, Warm, Hot or Qualified. Change the status only when I agree, and add a comment with the reason.

Convert a qualified lead

Uses tools from mcpcrm Solo and mcpcrm Team

Lead [name] is qualified. Search for an existing Organisation and Contact first, and tell me before you go on if the company is already in the CRM. Otherwise convert the lead with convert_lead and create an Opportunity named [deal name] with amount [amount], sales stage Qualification and expected close date [date].

Close a lead that is no fit

Lead [name] is no fit because [reason]. Set its status to Lost Lead, or Junk Lead if it is spam, add a comment with the reason, and list its open Tasks for me. Keep the record, so that nobody contacts them again by mistake.

Data clean-up

Duplicates, formats, missing details and opt-outs, fixed in small batches.

Find duplicates

Look for duplicate Contacts and Organisations: the same email address, the same phone number, or names that differ only in spelling or capitals. List each group with record IDs and say which record looks most complete. Merge and delete nothing. I will decide.

Fix formats in batches

Check Contacts and Leads for format problems: names in all capitals or all lower case, email addresses with capitals, and phone numbers without a country code (local numbers are +[code]). Show me the first 20 fixes. When I approve, fix the rest in batches of 20, and stop at the first CONFIRM_REQUIRED.

Fill in missing details

List Leads with no lead source, no email address or no phone number. For a missing lead source, suggest a value from the description and the first email. For missing contact details, look only on the company's own website and give the page address as the source. Never guess an email address from a pattern.

Record opt-outs

Search the emails and comments of the last 30 days for anyone who asked not to be contacted again. List them with the words they used. When I confirm, record the opt-out the way this workspace does it, set any Lead among them to Junk Lead, and add a comment with the date and their words.

Outreach

Research, import, personal drafts and the campaign report. A person approves before anything is sent.

Brief a research AI

Find businesses in [area] in these categories: [categories]. For each, give the name, category, town, phone number, email address, website and a contact person if there is one. Record an email address only if you saw it on a page that belongs to that business, and give that page as the source with a confidence level. Check whether a business without a website has a page on a parent business's site, and flag inboxes that several businesses share. Return a CSV file with one row per business and these columns: [columns].

Import a research file

Uses tools from mcpcrm Solo and mcpcrm Team

Import the attached research file as Leads. First call describe_module for Leads and show me how you will map each column, which custom fields you need, and how you will spot duplicates (by email address, then website). Import 5 rows as a test and show me the result. Then import the rest in batches with import_records, stop at the first CONFIRM_REQUIRED, and give me the counts at the end.

Write personal drafts

Uses tools from mcpcrm Team (campaigns)

Read the brief for campaign [name] with get_campaign_brief. Write a first email for each Lead in [list or tier] that has an email address and no earlier campaign email. Name at most three problems, each as an effect on their business, and use the brief's opt-out sentence. Save them as drafts with draft_emails. Send nothing, and show me five samples first.

Read the campaign report

Uses tools from mcpcrm Team (campaigns)

Call campaign_report for campaign [name]. Tell me how many emails were sent, delivered and bounced, why each bounce happened, how many replies came from a person, and the reply rate by subject variant. Suggest what to change in the next round, and change nothing in the campaign.

Review and undo

Check what the agent did, so you can keep it or undo it.

End-of-session summary

Before you stop, list every record you created, changed or commented on in this session, with its ID and what you did. Point out anything you were unsure about, so that I can check it or undo the session.

What changed on a record

Uses tools from mcpcrm Solo and mcpcrm Team

Call get_history for [record]. Tell me in plain words who changed what and when, and which changes an agent made.

Use the prompts well

- Give your agent the CRM manual and your own rules first, so that every prompt starts from the same rules.
- Prompts that change records ask the agent to show you the changes first. Keep that part when you adapt them.
- End every session with the summary prompt, so that you know what changed.