MODULE 01

ICP Prospecting + Cold Email Agent

Find your ideal clients online, log them to your CRM, and send Charm Offensive emails — fully automated.

Time to set up	90–120 minutes first setup, 10 minutes to run weekly
Difficulty	Intermediate ★★★■■
What you'll have	A working Claude agent for: ICP Prospecting + Cold Email Agent

THE TWO-PHASE SYSTEM

This is not one agent — it's two working in sequence. Phase 1 finds and logs prospects. Phase 2 emails them. Keeping them separate gives you quality control at every stage.

PHASE 1 — RESEARCH	PHASE 2 — EMAIL
Run bi-weekly (1st & 15th). Search 3 niches. Save prospect list. Add to HubSpot CRM.	Run weekly (every Wednesday). Pull from HubSpot. Research. Write Charm Offensive. Send + Log.

WHAT THIS AGENT DOES

Phase 1 — ICP Research (bi-weekly):

- ■ Searches the web across 3 prospect niches matching your ICP
- ■ Saves a dated prospect list file to your computer
- ■ Adds new contacts to HubSpot CRM with duplicate check

Phase 2 — Cold Email (weekly):

- ■ Pulls leads from HubSpot not contacted in 60+ days

- Researches each lead for one specific personalization angle
- Writes a Jon Buchan Charm Offensive email — 80-120 words, disarming and direct
- Saves a Gmail draft in your inbox for review
- Sends from your business email via Zapier SMTP
- Logs activity in HubSpot with a 60-day re-contact lock
- Delivers a full summary report of every email sent

TOOLS YOU'LL CONNECT

Claude Desktop	Web Search MCP for live prospect research
HubSpot CRM	Free account — stores prospects, tracks contact history, prevents duplicates
HubSpot MCP	Claude Desktop Extension — connects Claude to your HubSpot account
Zapier MCP	Two actions: Gmail Create Draft + SMTP by Zapier (outbound send)
Business Email	Your real sending address (Dreamhost, Google Workspace, etc.) via SMTP
Gmail	Review copies of every draft before and after sending

BEFORE YOU BUILD — DEFINE YOUR ICP

Your ICP (Ideal Client Profile) is the foundation of both agents. Answer these questions before writing your system prompts:

Who are they?

Title, role, type of business (solo practitioner, agency, nonprofit, etc.)

Where are they?

Geography: US, Canada, UK, global — be specific so Claude targets the right regions

What's their company size?

Solo/self-employed is easiest to reach. Up to 10 is fine. Enterprise is harder.

What are their budget signals?

Published books, paid programs, 'fully booked', TEDx talks, hiring posts, major media quotes

What are your 3 target niches?

Pick 3 distinct groups — e.g., K12 educators, executive coaches, keynote speakers. 3 niches = enough variety per run.

What are your red flags?

Under 1 year independent, only free offerings, already has a polished site under 2 years old

STEP-BY-STEP SETUP

01

Create a Free HubSpot Account

Go to hubspot.com and sign up for free. Once inside, go to Settings → Account Setup → Account ID and note your Account ID. Go to Settings → Users and note your Owner ID. You'll add both to your Phase 1 system prompt.

02

Connect HubSpot MCP in Claude Desktop

Claude Desktop → Settings → Extensions → Add → search 'HubSpot'. Authorize with your HubSpot account. Restart Claude Desktop when done. Confirm it shows as Active in Extensions before continuing.

03

Enable Web Search MCP

Claude Desktop → Settings → Extensions → confirm Web Search (or Brave Search) shows as Active. This is what lets Claude research prospects live across the web during Phase 1.

04

Set Up Zapier — Gmail Draft Action

In Zapier, create an Action: Gmail → Create Draft. Connect your Gmail account. Then enable it in Claude Desktop → Extensions → Zapier MCP. This saves review copies of every email to your inbox before sending.

05

Set Up Zapier — SMTP Outbound Action

In Zapier, create an Action: SMTP by Zapier → Send Outbound Email. Enter your business email's SMTP credentials (host, port, username, password — from your email host). Enable in Claude Desktop → Extensions → Zapier MCP. This sends from your real business address.

06

Create Two Claude Projects

Project 1: **'ICP Research Agent'** — for finding and logging prospects bi-weekly. Project 2: **'Cold Email Agent'** — for writing and sending weekly Charm Offensive emails. Keeping them separate prevents sessions from mixing up context.

07

Paste System Prompts

Add System Prompt A (below) to your ICP Research Project. Add System Prompt B (below) to your Cold Email Project. Fill in every [BRACKETED] section with your specific ICP, business details, file paths, and HubSpot IDs.

08

Run a Test Pipeline

Phase 1 first: type 'Run my bi-weekly ICP prospecting session.' Check HubSpot for new contacts. Then Phase 2: type 'Run my weekly cold email session.' Check Gmail drafts and your business inbox for sent copies.

SYSTEM PROMPT A — ICP RESEARCH AGENT

You are running a bi-weekly ICP prospecting session for [YOUR NAME], a [YOUR ROLE] who serves [YOUR TARGET AUDIENCE]. OBJECTIVE: Find 10-20 new qualified prospects matching my ICP, save them to a dated file, and add them to HubSpot. MY ICP: Sweet-spot client: [Describe in 1-2 sentences — who they are and what makes them a great fit] Best-fit titles: [List 5-8 specific job titles] Geography: [e.g., US and Canada first, then UK, Australia, New Zealand] Company size: [e.g., Solo/self-employed (1-2 people) is the sweet spot] Budget signals — prioritize prospects who show: - [e.g., Published book, traditional publisher preferred] - [e.g., Actively promoting paid programs, courses, or masterminds] - [e.g., "Fully booked," "waitlist," or "next cohort"] - [e.g., TEDx talk or major media quotes (HBR, Forbes, Inc.)] - [e.g., Hiring VAs, content creators, or ops managers] Red flags — SKIP these: - [e.g., LinkedIn under 1 year as independent] - [e.g., Only free offerings with no paid programs] - [e.g., Already has a polished custom site under 2 years old] MY 3 SEARCH NICHES: Niche 1: [e.g., K12 educators and independent education consultants] Niche 2: [e.g., Executive and leadership coaches (ICF-credentialed preferred)] Niche 3: [e.g., Keynote speakers, authors, and thought leaders] SEARCH STRATEGY: For each niche, run at least 3 searches using: - site:linkedin.com + [niche title] + [credibility signal] - Speaker bureau listings (AAE, Premiere Speakers, Thinkers360) - "[niche title]" "fully booked" OR "waitlist" OR "next cohort" - "[niche title]" "book" OR "TEDx" OR "keynote" self-employed STEP 1 - RESEARCH: Search across all 3 niches. Cover at least 3 search queries per niche. STEP 2 - SAVE TO FILE: Save all prospects to: [YOUR FILE PATH]\Prospect List - [TODAY'S DATE].md Format each entry: Name | Title | Location | LinkedIn URL | Website URL | Why they fit (1-2 sentences) | Budget signals STEP 3 - ADD TO HUBSPOT: Add each qualified prospect as a new HubSpot contact. Account ID: [YOUR ACCOUNT ID] | Owner ID: [YOUR OWNER ID] Set: firstname, lastname, jobtitle, company, website, hs_linkedin_url, hubspot_owner_id Search HubSpot first — skip duplicates. REPORT: Prospects found, contacts added to HubSpot, notable patterns.

CHOOSE YOUR EMAIL STYLE

Before you build System Prompt B, pick the email style that matches your personality and audience. Each master below has a distinct philosophy. You'll paste your chosen style into the [EMAIL STYLE] field of the system prompt. You can combine two if they complement each other.

Jon Buchan	Charm Offensive
Study for: B2B creative outreach, agency + consultant client acquisition	Disarming candour + humor. Make them smirk. Sounds like a witty peer, not a vendor. 80-120 words. Subject: 2-4 words, lowercase.

Ben Settle	Daily Email / Entertainment
Study for: Building a loyal audience that buys repeatedly — coaches, consultants, info products	Daily emails. Storytelling + polarizing opinions. Entertainment over persuasion. Readers look forward to opening.

Daniel Fazio	B2B Outbound Systems
Study for: Lead generation for agencies and SaaS — scalable, personalized outreach	Systematic personalization at scale. Strong focus on relevance signals. Built for outbound agencies doing volume.

Alex Berman	Meeting Booking
Study for: Booking calls via cold outreach — agency client acquisition, practical frameworks	Direct, practical, no fluff. Optimized for one goal: getting a reply that turns into a meeting. Very tactical.

Chris Orzechowski	Storytelling + Conversion
Study for: Turning subscribers into customers — creators and info businesses	Ben Settle student. Balances storytelling with conversion psychology. Strong narrative arc in every email.

Gary Halbert	Conversational Persuasion
Study for: Human psychology and salesmanship fundamentals — the Boron Letters	Deceased legend. Simple, conversational copy. Writes like a person, not a marketer. Studies human desire.

John Carlton	Personality-Driven Copy

Study for: Voice and emotional impact — aggressive, punchy style	Master of personality-driven copy. Every email has a point of view. Huge influence on modern outreach voice.

Joanna Wiebe	**Conversion Copywriting**
Study for: Conversion-focused email and landing pages — data-driven optimization	Most respected conversion copywriter today. Voice-of-customer research. Every word earns its place.

André Chaperon	**Soap Opera Sequences**
Study for: Email storytelling and sequences — keeping readers hooked across a series	Creator of the Soap Opera Sequence. Each email ends on a hook. Turns a list into an audience that reads everything.

Ian Stanley	**Humor + Salesmanship**
Study for: Modern personality-driven emails — blends comedy with strong closes	Funny without being fluffy. Humor disarms, story engages, offer converts. Reads like a friend with good taste.

RECOMMENDED LEARNING ORDER — AGENCY & SERVICE BUSINESSES

First	Jon Buchan — creative outreach that gets replies
Second	Daniel Fazio — systems for doing it at scale
Third	Alex Berman — appointment-setting tactics
Fourth	Ben Settle — relationship-based selling over time
Fifth	Chris Orzechowski — turning warm leads into buyers
Then	Joanna Wiebe + Gary Halbert + John Carlton — foundational persuasion

SYSTEM PROMPT B — COLD EMAIL AGENT

Fill in [EMAIL STYLE] with your chosen master above. You can blend two (e.g., 'Jon Buchan Charm Offensive with Gary Halbert's conversational simplicity').

> You are my weekly cold email assistant. Run this workflow every Wednesday. Be decisive. Do not ask for confirmation — execute completely. CONTEXT: [YOUR NAME] runs [BRIEF DESCRIPTION OF YOUR BUSINESS]. Public email: [YOUR BUSINESS EMAIL] | Review email: [YOUR GMAIL] EMAIL STYLE: [YOUR CHOSEN MASTER — e.g., "Jon Buchan Charm Offensive"] Apply this master's philosophy, structure, and voice rules to every email you write. Key principles: [PASTE 3-5 BULLET POINTS FROM YOUR CHOSEN STYLE — e.g., for Jon Buchan:] - Disarming candour — sound like a witty peer, not a vendor running a sequence - Make them smirk — unexpected or honest opener, never "I hope this finds you well" - 80-120 words first touch — one specific value prop, one low-friction CTA - Subject line: 2-4 words, lowercase, no punctuation (looks internal: "your website", "quick thought") - Contractions always. No jargon: no synergy, leverage, circle back, seamless, best-in-class STEP 1 - PULL FROM HUBSPOT: Pull contacts where: last contacted date is empty OR more than 60 days ago, lifecycle stage is Lead/Subscriber/MQL (not Customer). Pull up to 10 per run. Collect: name, email, company, job title, website, any HubSpot notes. STEP 2 - QUICK RESEARCH: For each contact, find ONE specific observation — their industry, pain point, or trigger from notes. Even one real detail transforms a generic pitch into a personalized email. STEP 3 - WRITE EMAILS: Apply [EMAIL STYLE] to every email. The personalized observation must naturally lead into why you're reaching out — if you can remove it and the email still works, the personalization isn't working. YOUR SERVICES — match to prospect: - [SERVICE 1]: [Who it's for and what problem it solves] - [SERVICE 2]: [Who it's for and what problem it solves] Sign every email: [YOUR NAME] / [YOUR BUSINESS EMAIL] STEP 4 - SAVE GMAIL DRAFTS: Zapier Gmail Create Draft → save to [YOUR GMAIL]. Log each one. STEP 5 - SEND VIA SMTP: Zapier SMTP Outbound → From: [YOUR BUSINESS EMAIL] | BCC: [YOUR BUSINESS EMAIL]. STEP 6 - LOG IN HUBSPOT: Add note: "Cold email sent [TODAY'S DATE]. Do not re-contact for 60 days." STEP 7 - SUMMARY: Table: Name | Company | Style Applied | Angle Used | Sent | Draft Saved. Show each subject + body.

KEY PROMPTS

Run Bi-Weekly ICP Research

> Run my bi-weekly ICP prospecting session. Search all 3 niches. Save to today's prospect file. Add new contacts to HubSpot. Report back with totals.

Run Weekly Cold Email Session

> Run my weekly cold email prospecting session. Pull up to 10 leads from HubSpot not contacted in 60+ days. Research each, write emails in my chosen style, save Gmail drafts, send via SMTP, log in HubSpot. Deliver full summary report.

Single Lead — Research + Email

> Research [PROSPECT NAME], [TITLE] at [COMPANY]. Website: [URL] | LinkedIn: [URL] Write a cold email in my [EMAIL STYLE]. Save as Gmail draft and send via SMTP.

Style Switch — Test a New Approach

> Write two versions of a cold email for [PROSPECT NAME] at [COMPANY]: Version A: [STYLE 1 — e.g., Jon Buchan Charm Offensive] Version B: [STYLE 2 — e.g., Gary Halbert conversational] Which would you send and why?

Niche Search Only

> Search for new prospects in the [NICHE] space only. Use my ICP criteria. Append findings to today's prospect file. Do not add to HubSpot yet — I'll review first.

PRO TIPS

- Run Phase 1 on the 1st and 15th. Run Phase 2 every Wednesday. The cadence compounds over months.
- Start with Jon Buchan if unsure — disarming candour works across almost every B2B niche.
- The 60-day re-contact rule prevents burning your list — Claude enforces it via HubSpot notes automatically.
- Add budget signals to HubSpot contact notes when you spot them — Phase 2 uses them for personalization.
- Style Switch prompt: run two versions of the same email in different styles — see which gets more replies.
- The BCC to your business email creates a real sent-mail record in your inbox — not just a Gmail draft.