

THE COMPLETE PLAYBOOK

Build Funnels In One Prompt With **Perspective**

The Claude MCP that turns a single conversation into a complete sales funnel — landing pages, a multi-step survey, an automated email sequence, and CRM integration. From zero to published in minutes.

USE IT YOURSELF · OR SELL IT AS A SERVICE

MCP setup · Prompt playbook · Two funnel types · CRM integration · 7-day plan

What's Inside

A working playbook for building real, conversion-focused sales funnels by chatting with Claude. Either for your own business — or as a service you sell to clients at agency rates.

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CHAPTER 01

The \$10,000 Job You Can Now Do in One Prompt

Every million-dollar brand online runs on a sales funnel. Not a website. A funnel — the machine that captures potential clients, qualifies them, and follows up with automated emails until they buy or book a call.

A real sales funnel is several things working together: landing pages with persuasive headlines, a multi-step survey that qualifies and segments visitors, and a full automated email sequence that nurtures them after they opt in.

Normal websites don't make money. Funnels do — because they don't let people just wander off and forget about you. They capture, qualify, and follow up automatically.

The problem until now: building one well took skill across copywriting, design, page-builders, email automation, and CRM integration. Agencies have charged up to **\$10,000** to put one together.

This playbook shows you how to do the same job in one prompt to Claude — start to finish, end to end — by connecting Claude to Perspective through a Model Context Protocol (MCP) connector.

\$10k+

TYPICAL AGENCY COST

1

PROMPT TO BUILD

30 sec

MCP SETUP TIME

Free

TRIAL INCLUDED

Two ways to use this playbook

The same skill works two ways. **For your own business:** build a lead-gen funnel to grow your email list, or a book-a-call funnel to fill your calendar with qualified prospects. **As a service for clients:** small businesses, freelancers, coaches, and agencies pay \$1,000–\$10,000+ for one funnel. With Perspective, one operator can deliver the same output in an afternoon.

Both angles are covered. Start with the funnel that fits your situation today.

What Perspective Actually Is

Perspective is a mobile-first AI funnel platform. You connect it to Claude through the Model Context Protocol (MCP), and from that point on you describe what you want the funnel to do — in plain language — and Claude builds the pages, the survey, the email sequence, and the structure for you.

It's not giving advice about funnels. It's building the actual thing — pages, copy, survey logic, emails, branding — directly in your Perspective workspace, ready to publish.

What's in the platform

- **Mobile-first funnel builder** — optimized for the way 98%+ of users now access funnels (via social ads on phones)
- **Built-in CRM** with statuses, tasks, and automated messaging
- **Native email and SMS sequences** — no need for a separate email tool to get started
- **16 expertly crafted templates** tested across 50+ industries
- **2 million license-free graphics and components**
- **GA4 and pixel tracking** for paid traffic and analytics
- **Custom domains** on all paid plans
- **Native integrations** with ActiveCampaign, Zapier, Facebook Pixel, and more

The mental shift

You used to open a builder, pick a template, write all the copy, build the opt-in page, build each survey step, build the thank-you page, and then go write three follow-up emails. That's most of a working day.

Now you write one prompt. Claude does all of it. You spend the rest of the time editing, optimizing, and driving traffic.

WHY "MOBILE-FIRST" MATTERS

Perspective is engineered specifically for the way people actually consume funnels today — on phones, scrolling through Instagram, TikTok, and Meta ads. Pages load fast, the editor is built for vertical layouts, and the templates are tested against the behavior patterns of mobile users. If your traffic is from social ads, this is the right fit by default.

Connect the MCP in 30 Seconds

Before you can ask Claude to build anything, you need to connect the Perspective MCP. This is a one-time setup that takes about half a minute. After this, every chat with Claude has Perspective tools available.

1 Open Claude Settings

In Claude (claude.ai, Claude Desktop, or Cowork), go to **Settings** → **Connectors** → **Add custom connector**.

2 Fill in the connector details

Give the connector a name (e.g. `Perspective`) and paste the MCP URL:

```
https://perspective-api.co/mcp
```

3 Click Add → Connect → Sign in

Claude opens a browser window for OAuth. Sign into your Perspective account. The connection is brokered through your Claude account from Anthropic's infrastructure, so once it's authorized, every chat in your workspace has Perspective available.

4 Verify it works

Start a new Claude chat and type something only Perspective can do, e.g.:

"List my Perspective workspaces and the funnels in each."

If Claude returns real data, the MCP is live and ready.

A ONE-TIME JOB

You only do this setup once per Claude workspace. After it's connected, every new chat — whether you're building, editing, or optimizing a funnel — has the Perspective tools available without any reconnection.

Don't have Perspective yet?

Sign up at perspective.co first. The free trial gives you full access to build, test, and publish a real funnel before committing to a paid plan. You don't need a paid account to use the MCP — the free trial is enough to follow this entire playbook end to end.

Add a Sender Before You Build

Funnels usually come with email sequences attached. Before those emails can actually be created and sent, your Perspective workspace needs a verified sender. This is a one-time setup that prevents your email sequences from being built but unable to send.

Two options

SENDER OPTION	WHEN TO USE IT
Workspace email (built-in)	The fastest way to get going. Perspective's internal sender works immediately. Recommended for testing, your first build, or if you don't yet have a custom sending domain set up. Emails come from a Perspective-managed address.
Your verified sending address	For brand consistency. Verify your own email or domain so messages come from your address. Best for serious launches, client work, and any funnel meant to convert real traffic.

How to add one

1. In your Perspective workspace, go to **email/sender settings**.
2. Choose to use the workspace email (instant) or verify your own sending address (recommended for production).
3. If verifying a custom domain, follow the DNS verification flow — it takes a few minutes once your DNS records are in place.

PRO MOVE

Start with the workspace email on your first build to confirm the whole flow works end to end. Once your funnel is producing leads, switch the sender to your verified domain for the polished, on-brand experience.

Specify the sender in your prompt

When you ask Claude to build the funnel, tell it which sender to use. The lead-gen prompt in Chapter 6 ends with the line:

"Email Sender: use the workspace email."

Swap that to your own verified address when you're ready.

Funnel Types You Can Build

Perspective ships with proven templates across every major funnel category — appointments, lead generation, online sales, recruiting, and audience research. You can build any of them, branded to your business, by adapting the same prompt pattern in Chapter 6. Two are the natural starting points for most solo businesses.

Start with one of these two

STARTER FUNNEL 1

Lead-Gen Funnel

You give something away free — a template, a checklist, an automation pack, a guide — and in exchange people give you their email. A short survey on the way through tells you what each person actually wants, so your follow-up emails land. **Best for:** building an audience, growing an email list, anyone building a content business or info product. Every serious online business starts here, because an email list is the one asset you actually own.

STARTER FUNNEL 2

Book-a-Call Funnel

A landing page that pitches your service, qualifies visitors with two or three questions, collects their contact info, and puts the serious ones straight onto your calendar. **Best for:** anyone selling a service — freelancers, agencies, consultants, coaches. If you need to talk to a client before they buy, this is the funnel that fills your calendar with the right people — not just anyone.

Anatomy of each

STAGE	LEAD-GEN FUNNEL	BOOK-A-CALL FUNNEL
1	Hero opt-in page (the offer)	Hook landing page (the pitch)
2	2–3 question survey (segment + qualify)	2–3 qualifying questions (filter out time-wasters)
3	Email capture	Opt-in: name, email, and phone
4	Thank-you / delivery page (give them what they signed up for)	Booking page with calendar embed
5	Automated 3-email nurture sequence	Thank-you page

WHICH TO START WITH

If you're growing an audience or selling info/digital products → lead-gen funnel. If you're selling 1-on-1 services, consulting, or anything that needs a call to close → book-a-call funnel. Don't try to build both on day one. Pick the one that maps to how you currently make (or want to make) money.

The Full Funnel Range

Beyond the two starters, Perspective supports a wide library of funnel types — built around the most common goals for solo founders, creators, agencies, and small businesses. Here's the full map, grouped by what each is designed to do.

Generate appointments

Funnels designed to put qualified prospects onto a call, a consultation, or an on-site visit.

TEMPLATE	BEST FOR
Strategy Call	Service businesses qualifying leads before a discovery call
Appointment	Showcasing an offer and letting prospects book a slot
On-site Appointment	In-person visits — clinics, studios, dealerships, salons
Coaching Offer	Coaches and consultants converting cold traffic into discovery calls
Case Study	Sharing a success story to generate similar-fit appointments
Solar Quote	Home services and trades requesting on-site quotes
Property Valuation	Real estate agents capturing seller leads with free valuations
Property Sales	Listing-specific funnels for serious buyers

Build an email list

Funnels designed to capture cold-to-warm traffic into your CRM and follow up automatically.

TEMPLATE	BEST FOR
Lead Magnet	Classic free-resource-in-exchange-for-email play
Quiz	Engaging quiz that segments leads as they answer
Health Quiz	Wellness, fitness, supplements — diagnose-then-recommend pattern
Contest / Giveaway	Bulk lead generation during launches or campaigns
Coupon	Discount-driven email capture for e-commerce and local
Survey	Audience research with email capture at the end

Make online sales

Funnels designed to convert visitors directly into paying customers — usually for digital products, courses, communities, or bundled offers.

TEMPLATE	BEST FOR
VSL Demo	Video sales letter funnel for premium offers
VSL Checkout	VSL + integrated checkout for one-flow conversion
Bundle Checkout	Multi-product checkout with built-in trust elements
Course Sales	Course landing pages with enrollment-focused structure
Skool VSL	Selling a Skool community via video
Live Webinar	Capturing webinar registrations and pre-event excitement
Offer	Direct-offer funnel where prospects receive a quote or proposal

Source talent

Funnels designed for hiring — engaging qualified candidates and filtering applications.

TEMPLATE	BEST FOR
Recruiting	Showcasing company culture and capturing applicants
Express Application	Fast-apply flow for high-volume hiring
Careers Page	Posting multiple jobs and centralizing applications
Recruiting Quiz	Gamified candidate qualification
Tester	Finding product testers or research participants

Gain insights

Funnels designed to learn about your audience — what they want, what they'd pay for, what they're struggling with.

TEMPLATE	BEST FOR
Survey	Pure research — no offer, just questions
Quiz	Engagement-driven research that segments as it asks
Product Finder	Letting prospects configure or self-select the right product

Operational / specialized

TEMPLATE	BEST FOR
Agency Onboarding	Launching new clients faster — intake, brief, asset collection
Social Profile	Personal brand landing page — turn followers into clients

THE PATTERN THAT WORKS ACROSS ALL OF THEM

The same prompt structure used in Chapter 6 — describe the offer, the flow, the audience, the voice, the brand — adapts cleanly across every funnel category Perspective supports. You're not learning 20 different prompt formats; you're learning one and adapting it. Chapter 6 shows you the core script prompts, then how to swap the flow for other funnel types.

How to choose

Don't pick by what looks coolest. Pick by what your business actually needs next:

- **Need leads on a list** → Lead Magnet, Quiz, Coupon, or Survey
- **Need calls booked** → Strategy Call, Coaching Offer, or Appointment
- **Need to sell a digital product directly** → VSL Demo, VSL Checkout, Course Sales, or Bundle Checkout
- **Need to fill an event** → Live Webinar
- **Need to hire** → Recruiting, Express Application, or Careers Page
- **Need to learn what your audience wants** → Survey or Quiz

For most solopreneurs reading this, the answer is one of the first three. Pick that, build it once, and ship it — then come back for the others as you grow.

The Full Prompt Playbook

These are the exact prompts to use in Claude with the Perspective MCP connected. Copy them as-is, swap your specifics into the bracketed placeholders, paste into Claude, and hit send. The funnel will be built directly in your Perspective workspace.

Prompt 1 — Lead-Gen Funnel

This is one prompt that builds the entire funnel — landing pages, survey, email capture, and thank-you / delivery page — in one go.

BUILD · LEAD-GEN FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a multi-step lead-gen funnel AND its email sequence in one go.

Funnel: offer 3 free AI automations in exchange for an email. Flow: (1) hero opt-in, (2) a short 2-3 question survey (what they want to automate, their experience level, whether they build for themselves or clients), (3) email capture, (4) thank-you/delivery page handing over the 3 automations.

Extract my brand design details from [YOUR WEBSITE URL]

Audience: [YOUR AUDIENCE – e.g. cold-to-warm YouTube viewers who build automations and use Claude].

Voice: direct, practical, no hype – a maker talking to makers.

Prompt 2 — Lead-Gen Email Sequence

Either paste this in the same conversation right after Prompt 1, or combine the two if you want everything built from a single message.

BUILD · LEAD-GEN EMAILS (CLAUDE / MCP)

Use the Perspective MCP to add a 3-email nurture sequence to that funnel.

Email 1: deliver the freebie – link to the download page [YOUR DELIVERY PAGE URL] – and set expectations.

Email 2: give one quick win, then point to the full library at [YOUR OFFER URL] with a soft CTA.

Email 3: make the offer with a deadline, linking to the library at [YOUR OFFER URL].

Keep the voice direct, practical, no hype – a maker talking to makers.

Email Sender: use the workspace email.

Prompt 3 — Book-a-Call Funnel

This builds a full discovery-call funnel with a calendar embed, qualifying questions, and an opt-in capturing name, email, and phone.

BUILD · BOOK-A-CALL FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a multi-step book-a-call funnel for [YOUR ROLE – e.g. a freelancer who sets up AI automations and Claude workflows for small businesses].

Goal: book discovery calls.

Flow: (1) hook landing page, (2) 2-3 qualifying questions, (3) opt-in capturing name, email and phone, (4) a booking page with my Calendly embedded ([YOUR CALENDLY URL]), (5) thank-you page.

Voice: confident, plain-spoken.

BRAND (use exactly): [BACKGROUND HEX], [ACCENT HEX], clean sans-serif (Inter or DM Sans), high contrast, minimal. No Playfair Display, no light background.

Prompt 4 — Calendly Prefill

Paste this one into **Perspective's built-in AI chat editor** (not Claude). It connects what visitors entered in the opt-in step to the Calendly widget so they don't have to retype their name and email on the booking page.

CONFIGURE · CALENDLY PREFILL (PASTE IN PERSPECTIVE'S AI CHAT)

On the booking page, make the Calendly widget automatically prefill the visitor's name and email from what they entered in the opt-in step, so they don't have to type it twice. Wire it up cleanly without breaking the page navigation or buttons.

Prompt 5 — Optimize with Claude

Once your funnel has been running and collecting data, paste this back into Claude. It reads your real numbers and tells you what to fix.

OPTIMIZE · FUNNEL PERFORMANCE (CLAUDE / MCP)

Use the Perspective MCP to look at the data on my opt-in funnel.

Tell me where it's leaking — opt-ins vs. email opens vs. deliveries — and ship a fix for the weakest step.

Also give me 3 headline variations to A/B test this week.

HOW TO READ THESE PROMPTS

Everything in [BRACKETS] is your specific information — swap it in. Everything outside the brackets is the instructional skeleton that tells Claude exactly what to build, in what order, with what structure. That structure is doing the heavy lifting — don't over-edit it.

Adapting the pattern to other funnel types

The five prompts above are the script's exact templates. The same pattern — describe the goal, the flow, the audience, the voice, the brand — adapts to every other funnel type in Chapter 5. Below are example prompts you can use as starting points for the most common adaptations. They follow the same shape; only the flow changes.

WEBINAR REGISTRATION FUNNEL

BUILD · WEBINAR REGISTRATION (CLAUDE / MCP)

Use the Perspective MCP to build a webinar registration funnel.

Webinar topic: [YOUR WEBINAR TITLE]. Date/time: [DATE AND TIME WITH TIMEZONE]. Audience: [WHO IT'S FOR].

Flow: (1) hero landing page with the webinar promise and one-line outcome the attendee will get, (2) registration form (name and email), (3) confirmation page with calendar add-to-calendar buttons and what to expect.

Also build a 3-email pre-webinar sequence: confirmation immediately, reminder 24 hours before, last-call reminder 1 hour before. Keep voice [VOICE].

Use my brand: extract from [YOUR WEBSITE URL].

Email Sender: use the workspace email.

VSL / VIDEO SALES LETTER FUNNEL

BUILD · VSL FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a VSL (video sales letter) funnel for [PRODUCT/OFFER NAME].

Flow: (1) hero page with the VSL video embedded ([YOUR VIDEO URL]) and a hidden CTA that appears mid-video, (2) below-the-fold benefits and proof, (3) checkout or apply-now page with the offer details, (4) thank-you page.

Audience: [WHO THIS IS FOR]. Voice: [VOICE]. Price point: [PRICE].

Brand: [BRAND BLOCK – colors, font, exclusions].

Email Sender: use the workspace email.

COURSE SALES FUNNEL

BUILD · COURSE SALES FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a course sales funnel for [COURSE NAME].

The course teaches [OUTCOME] to [AUDIENCE] in [TIMEFRAME]. Price: [PRICE].

Flow: (1) hero landing with promise and one-line outcome, (2) curriculum overview (modules and outcomes), (3) social proof / testimonials section, (4) FAQ section, (5) enrollment / checkout page, (6) thank-you with onboarding next steps.

Also build a 3-email enrollment sequence: welcome and access, quick-start in the first module, and an upsell or community invite.

Brand: [BRAND BLOCK]. Voice: [VOICE].

Email Sender: use the workspace email.

QUIZ FUNNEL FOR LEAD SEGMENTATION

BUILD · QUIZ FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a lead-segmenting quiz funnel.

Quiz topic: [TOPIC – e.g. "What's your AI maturity level?", "Which automation should you build first?", "What's your biggest content bottleneck?"]. Number of questions: 5-7.

Flow: (1) hero page introducing the quiz and the personalized result they'll get, (2) the quiz questions one at a time, (3) email capture before showing the result, (4) personalized result page based on their answers, (5) targeted offer matching their result segment.

Audience: [WHO]. Voice: [VOICE].

Tag each answer in the CRM so I can send segment-specific follow-up later.

Brand: extract from [YOUR WEBSITE URL].

Email Sender: use the workspace email.

COUPON / PROMO FUNNEL

BUILD · COUPON FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a coupon / promo funnel.

Offer: [DISCOUNT – e.g. "20% off first purchase", "Free shipping for new customers", "\$X off a specific product"]. For: [WHAT THE DISCOUNT APPLIES TO].

Flow: (1) hero page with the offer hook and urgency element, (2) email capture to unlock the coupon, (3) reveal page showing the coupon code with a copy-to-clipboard button and a redirect to my store/site ([YOUR STORE URL]).

Also build a 2-email follow-up: immediate delivery with the code, and a reminder 48 hours later before the discount expires.

Brand: [BRAND BLOCK]. Voice: [VOICE].

Email Sender: use the workspace email.

COACHING OFFER FUNNEL

BUILD · COACHING OFFER (CLAUDE / MCP)

Use the Perspective MCP to build a coaching offer funnel for [YOUR COACHING PROGRAM].

The program helps [WHO] achieve [SPECIFIC OUTCOME] in [TIMEFRAME]. Price: [PRICE or "starting at X" or "application only"].

Flow: (1) hero with the transformation promise and proof of past clients, (2) what's inside the program – sessions, deliverables, support, (3) 2-3 qualifying questions to filter applicants, (4) application form (name, email, phone, current situation, biggest challenge), (5) booking page with my calendar embedded ([YOUR CALENDAR URL]) for qualified applicants, (6) thank-you page.

Voice: [VOICE]. Brand: [BRAND BLOCK].

RECRUITING / JOB APPLICATION FUNNEL

BUILD · RECRUITING FUNNEL (CLAUDE / MCP)

Use the Perspective MCP to build a recruiting funnel for [ROLE/POSITION] at [COMPANY].

Flow: (1) hero page selling the role and company culture (what makes this job worth applying for, not just job-board basics), (2) 3-4 qualifying questions to filter for fit (experience, location, salary expectation, availability), (3) application form capturing name, email, phone, resume upload if possible, (4) thank-you page with next-step expectations and timeline.

Voice: [VOICE – e.g. warm, direct, founder-led]. Brand: extract from [YOUR WEBSITE URL].

Also build a 2-email candidate sequence: application received with next steps, and a "still thinking it over?" follow-up 48 hours later.

Email Sender: use the workspace email.

NOTICE THE PATTERN

Every prompt above follows the same structure: **tool call** → **goal** → **flow** → **audience** → **voice** → **brand** → **email sender**. Once you've used it twice, you'll be writing your own from memory.

The hard part isn't the prompt — it's deciding what you actually want the funnel to do. The prompt just translates your decision into a built funnel.

Brand & Design

Your funnel needs to look like your brand from the first build — not "AI default" with adjustments after. Lock the look down inside your prompt and Claude will apply it across every page automatically.

Two ways to specify your brand

OPTION A — REFERENCE YOUR WEBSITE

If you have a clean existing website, you can tell Claude to extract your brand details from it. The lead-gen prompt in Chapter 6 uses this approach:

"Extract my brand design details from [YOUR WEBSITE URL]"

Claude reads your site, picks up your colors, typography style, and visual tone, then applies them across the funnel.

OPTION B — SPECIFY IT EXPLICITLY

For more precise control — especially if your existing site isn't a perfect representation of where you're taking the brand — spell it out directly in the prompt. The book-a-call example uses this approach:

"BRAND (use exactly): dark background #111111, orange accent #F16334, clean sans-serif (Inter or DM Sans), high contrast, minimal. No Playfair Display, no light background."

Notice the structure: specific hex codes, specific fonts (or font characteristics), specific positive direction (high contrast, minimal), specific exclusions (no Playfair Display, no light background). The exclusions matter as much as the inclusions — they prevent Claude from defaulting to common but wrong choices.

The brand block template

TEMPLATE · BRAND SPECIFICATION BLOCK

```
BRAND (use exactly):  
- Background: [HEX]  
- Accent: [HEX]  
- Typography: [FONT NAME or "clean sans-serif (Inter or DM Sans)"]  
- Style: [DIRECTION – e.g. high contrast, minimal, premium, playful]  
- Avoid: [SPECIFIC EXCLUSIONS – e.g. no Playfair Display, no light background, no stock photos]
```

PRO TIP ON EXCLUSIONS

Telling Claude what NOT to do is often more powerful than telling it what to do. "No Playfair Display, no light background, no stock photos" prevents three common defaults that would silently make your funnel look generic. Make the exclusions specific to what you've actually seen go wrong before.

The Two Editing Modes

Once your funnel is built, you'll want to tweak things. Perspective gives you two editing modes — one for design, one for text. Knowing which to use removes most of the friction.

MODE 1 · FOR DESIGN

Perspective's built-in AI chat editor

Inside your Perspective workspace, every funnel has a chat editor. You tell it what you want changed — "add a section after the headline," "change the color of the survey buttons," "remove the testimonial section" — and it adjusts the design directly. This is how you change anything visual: adding sections, removing elements, changing layouts, adjusting styles.

MODE 2 · FOR TEXT ONLY

Manual editing

Click directly into any text element on the page — headline, button label, body copy, form labels, email subject lines — and type to change the wording. Fast, direct, no chat required. **Manual editing only changes the text itself.** You cannot use it to change button colors, fonts, sizes, layouts, backgrounds, spacing, or any other visual element. If you need to change anything beyond the words on the page, use the AI chat editor.

The simple rule

- Want to change **what something says** (the actual words)? → manual editing
- Want to change **anything else** — colors, button styles, fonts, layouts, sections, spacing, images, or any visual element? → AI chat editor

DON'T GET STUCK HERE

A common beginner trap is trying to change a button color by clicking on the button. That won't work — clicking only opens the text for editing. For anything visual, switch to the AI chat editor and describe the change in plain language: "make the primary buttons orange," "change the survey background to dark," "use Inter font everywhere." The AI chat editor handles all of that in seconds.

IMPORTANT DISTINCTION

Perspective's built-in AI chat editor is *different* from the MCP you set up in Chapter 3. The MCP runs in Claude and is for building and analyzing funnels from outside. The built-in AI chat editor is inside your Perspective workspace, attached to each funnel, and is for ongoing design changes. They complement each other — use the MCP to build and audit, use the built-in chat to iterate on design.

What to edit first

After your first build, walk through the funnel one screen at a time and look for three things:

1. **Headlines** — are they specific to your audience and clear about the value? Manual edit for quick tweaks.
2. **Survey questions** — do they ask what you actually need to know to follow up well? Manual or AI chat editor depending on whether you're changing wording or restructuring.
3. **CTAs** — do they tell people exactly what happens next, not "Submit" or "Continue"? Manual edits.

Connect Your CRM

A funnel that just collects emails into a spreadsheet is a partial funnel. The leverage compounds when every lead flows straight into your CRM and into automated follow-up sequences.

Perspective has direct integrations for the most common tools.

ActiveCampaign integration

The most common integration for solopreneurs and small businesses. In Perspective:

1. Open your workspace's **Integrations** settings.
2. Find ActiveCampaign and click **Connect**.
3. Authorize Perspective to access your ActiveCampaign account.

That's the one-time setup. From this point on, every funnel you build (or any funnel you've already built) can push leads directly into your ActiveCampaign lists, with tags applied based on the survey answers.

Other integrations

Perspective also integrates natively with:

- **Zapier** — connect to thousands of other apps
- **Facebook Pixel** — for ad conversion tracking
- **Custom domains** — host the funnel under your own URL on all paid plans
- **GA4** — for full analytics

What this changes

Without a CRM connection, every funnel is an island. With one, all your funnels feed into a single contact database where you can segment by source, tag by survey response, and run automated sequences across your entire list — not just per funnel.

This is the difference between running a funnel and running a marketing system. Once you connect it once, every future funnel inherits the connection automatically.

BUILT-IN CRM

Perspective also includes its own built-in CRM with statuses, tasks, and automated messaging. You can run an entire lead-management workflow without a separate tool. The external integrations are for when you want to centralize multiple data sources into your existing setup.

Optimize Your Funnel With Claude

Building a funnel is the easy part. Making it convert is the real work. With the MCP connected, Claude can read your funnel's real data, find where you're losing people, and ship fixes — without you having to dig through analytics yourself.

The optimization workflow

Once your funnel has been running long enough to collect meaningful data (usually a few hundred visitors), paste this into Claude:

OPTIMIZE · FUNNEL PERFORMANCE AUDIT

Use the Perspective MCP to look at the data on my opt-in funnel.

Tell me where it's leaking — opt-ins vs. email opens vs. deliveries — and ship a fix for the weakest step.

Also give me 3 headline variations to A/B test this week.

Claude reads the funnel data, identifies the weakest step, and either fixes it directly via the MCP or tells you exactly what to change. You'll also get three A/B headline variations to test.

What Claude actually checks

- **Opt-in rate** — what percentage of visitors become leads
- **Email open rate** — are people opening the follow-up sequence
- **Delivery rate** — are the emails reaching inboxes
- **Drop-off points** — at which survey question or page are people leaving

The honest result

Sometimes Claude will tell you the funnel itself converts fine and the problem is traffic, not the page. That's a useful answer — it stops you from rebuilding something that isn't broken. Other times it'll find a specific drop-off (a confusing survey question, a weak headline, an email that isn't landing) and propose a targeted fix.

REPEAT OPTIMIZATION PROMPTS

Treat optimization as a weekly habit, not a one-time event. Save the optimization prompt somewhere accessible (a notes app, a snippet manager) and run it every week. Small incremental fixes compound into significantly higher conversion over a few months.

Other optimization prompts worth running

OPTIMIZE · EMAIL SEQUENCE AUDIT

Use the Perspective MCP to audit my 3-email nurture sequence for the [FUNNEL NAME] funnel. Tell me which email has the weakest engagement and rewrite it. Keep the voice consistent with the others.

OPTIMIZE · SURVEY LOGIC

Use the Perspective MCP to look at how people are answering the survey on my [FUNNEL NAME] funnel. Are the answers giving me useful segments, or are most people choosing the same option? Suggest changes to the questions so I get more actionable segmentation.

Pricing, Plans & the Free Trial

Perspective offers a free trial — enough to build a complete funnel, test it, and confirm the platform fits before committing. After that, plans are billed annually with a 20% discount equivalent (about two months free per year).

The plan tiers

PLAN	BEST FOR
Base / Start	Solo founders and creators building 1–2 funnels. Full mobile-first builder, CRM, analytics, integrations.
Grow	Most working solopreneurs. Up to ~10 live funnels, multiple seats, larger contact limits. Sweet spot for serious solo businesses.
Expand	Agencies and freelancers selling funnels as a service. Up to ~20 funnels, more seats, more contacts.
Scale	Custom plan for larger teams running many client funnels or high-volume traffic.

What's worth knowing about the pricing model

- **Pricing scales with features and funnel volume, not contact count.** You don't get punished for growing your list — unlike many email-tool-based competitors.
- **The MCP is available on all plans.** You don't need to upgrade to use Perspective with Claude.
- **Free trial** on all plans. Sign up at perspective.co — no credit card required to start.
- **Annual billing gets ~20% off** vs monthly.
- **Live pricing** is at perspective.co — exact numbers update over time. Current ranges land roughly at €59–€297/month depending on tier, billed annually.

WHICH PLAN TO START ON

Start the trial on the lowest paid tier (Base/Start). Build one real funnel, run it, confirm the platform fits your workflow. If you find yourself wanting more funnels or seats — or if you're starting to take on client work — upgrade to Grow or Expand. Don't pay for capacity you haven't earned yet.

The Service Angle

If you can build a funnel for yourself, you can build one for a paying client. The same workflow, the same prompts, the same skill — applied to someone else's business at agency rates.

The market reality

Funnel building is one of the highest-paid skills in online marketing. Agencies charge \$3,000–\$10,000+ per funnel. Freelance funnel builders charge \$1,500–\$5,000. Small businesses, coaches, consultants, course creators, and local service businesses pay these rates because a good funnel makes the difference between paid traffic that converts and paid traffic that burns.

With Perspective + Claude MCP, one operator can deliver a complete funnel — landing pages, survey, email sequence, CRM integration, branded design — in a single afternoon. That's not "AI-powered." That's a real shift in production economics.

How to price your offer

OFFER LEVEL	TYPICAL RATE	WHAT YOU DELIVER
Single lead-gen funnel	\$1,000–\$2,500	Hero page + survey + email capture + thank-you + 3-email nurture sequence, branded
Single book-a-call funnel	\$1,500–\$3,500	Hook + qualifying questions + opt-in + booking page with calendar + thank-you
Funnel + CRM setup + ad-ready	\$3,000–\$7,000	Full funnel + CRM integration + pixel/GA4 tracking + ad creative or copy
Monthly funnel management	\$500–\$2,000/mo	Ongoing optimization, weekly A/B tests, performance reports

The simple positioning

Don't market as "AI funnel builder." Pick one niche and own it:

- "I build lead-gen funnels for coaches"
- "I build book-a-call funnels for freelance designers"
- "I build funnels for local service businesses (dentists, gyms, agencies)"

Niche positioning beats generalist positioning every time. Same skill, higher rates, easier referrals.

The starter offer

If you've never sold a funnel before, here's the move: offer one fully-built funnel for \$1,000 to your first three clients. Use those three as case studies. From client four onward, raise your rate to \$2,500. From client ten onward, charge \$5,000 plus monthly optimization retainers.

THE EXPAND-PLAN AGENCY MATH

Perspective's Expand plan supports up to ~20 live funnels and multiple seats — designed specifically for agencies and freelancers running client work. At even \$2,500 per funnel, the platform pays for itself with one project per month, and every additional client is high-margin pure-profit.

Power Moves: 10 Non-Obvious Tactics

Once you've built your first funnel, these are the moves that separate good output from great — and casual users from people getting real leverage.

1. **Build the funnel and the email sequence in the same prompt.** Splitting them into two requests costs time and risks inconsistency between the landing page voice and the email voice. One prompt, one voice, one deliverable.
2. **Always specify exclusions in your brand block.** "No Playfair Display, no light background" prevents Claude from defaulting to generic choices. Be specific about what bad looks like.
3. **Use the survey as a segmentation engine.** Don't treat the survey as "more friction." Treat it as the most valuable data collection point in your business. Every question is a tag your CRM can use later to send the right message to the right segment.
4. **Match voice to audience in the prompt.** "Direct, practical, no hype — a maker talking to makers" produces a completely different funnel than "confident, plain-spoken." Name the voice you want explicitly.
5. **Reference an existing brand URL when possible.** Telling Claude to extract from `fabimarkl.com` (or your equivalent) gives it more raw signal than any text description can. Use existing URLs as brand reference shortcuts.
6. **Connect your CRM before your first publish.** Don't collect leads into Perspective only and "move them later." Hook up ActiveCampaign or your CRM during setup so leads start flowing into your system immediately.
7. **Run the optimize prompt weekly.** Make it a Friday-afternoon habit. Five minutes of optimization weekly compounds into significantly better conversion over a quarter.
8. **Use manual editing for copy, AI chat for structure.** Mixing them up wastes time. Quick wording tweaks → click and type. New section or removed element → AI chat editor.
9. **Save your best prompts as templates.** Once you have a funnel prompt that produces output you love, save the exact prompt with the brand block and voice baked in. Reuse it across projects — just swap the offer and audience.
10. **Build a client funnel as a portfolio piece.** If you want to sell funnels as a service, your first three should be fictional-but-realistic case studies in three different niches. Post them publicly. They become your sales material.

Your 7-Day Mastery Plan

A concrete week to take you from "haven't connected anything" to "published a live, lead-generating funnel." One focused block per day. No guessing.

DAY 1

Set up the foundation

Sign up for the Perspective free trial at perspective.co. Connect the Perspective MCP to Claude using the URL `https://perspective-api.co/mcp`. Verify the connection by asking Claude to list your workspaces. Add a sender to your Perspective workspace.

DAY 2

Pick your funnel and write the brief

Decide which funnel you need first — lead-gen or book-a-call. Write down: the offer, the audience, the voice, and your brand colors and exclusions. This is your build brief. Don't build yet.

DAY 3

Build the funnel

Paste the matching prompt from Chapter 6 into Claude, swap in your specifics, and hit send. Watch Claude build the whole funnel inside your Perspective workspace. Click through every page once it's done.

DAY 4

Edit and polish

Walk through the funnel screen by screen. Use manual editing for any copy tweaks. Use the built-in AI chat editor for any structural or design changes. If you built a book-a-call funnel, configure the calendar prefill via Perspective's AI chat (Prompt 4).

DAY 5

Connect your CRM and tracking

Connect ActiveCampaign (or your CRM of choice) in Perspective. Set up tags based on your survey answers. Add Facebook Pixel and GA4 if you'll run paid traffic. Send a test lead through the funnel and confirm it reaches your CRM.

DAY 6

Publish and drive your first traffic

Publish the funnel. Send your first batch of traffic — your email list, a social post, a paid test budget, or a partner share. The goal isn't volume yet — it's real data to optimize against.

DAY 7

Optimize with Claude

Run the optimize prompt (Prompt 5) in Claude. Read the analysis. Pick the weakest step and let Claude ship the fix or rewrite. Run 3 A/B headline variations on the page that's losing the most traffic. From here, this becomes a weekly habit.

Pre-Publish Checklist

Run through this before you click publish on any funnel — your own or a client's. It takes 60 seconds and catches the most common avoidable misses.

- Perspective MCP is connected to Claude and verified working
- A sender is added in Perspective (workspace email or verified address)
- Brand colors, typography, and exclusions are locked into the build prompt
- Audience and voice are explicitly named in the prompt
- All landing pages reviewed on mobile preview, not just desktop
- Survey questions produce useful segments — not just generic answers
- CTAs are specific (e.g. "Get my 3 free automations") not generic ("Submit")
- Email sequence has been read end-to-end at least once
- All links in the emails go to the correct destination URLs
- Calendar embed (if book-a-call) is connected and prefill is configured
- CRM integration is live and a test lead has flowed through
- Pixel and GA4 are installed if you'll run paid traffic
- Thank-you / delivery page actually delivers what was promised
- Custom domain connected (on any paid plan) or workspace URL ready

Start building at perspective.co

Sign up for the free trial. Connect the MCP to Claude using <https://perspective-api.co/mcp>. Pick the funnel you need first. Paste the prompt. Watch it build.

Then start using it — for your own business, for a paying client, or both. The skill is the same. The pricing is up to you.

[Try Perspective at perspective.co](https://perspective.co) →

Final word

The hard part of funnel building was never the idea. It was the execution — opening the builder, writing the copy, designing each page, structuring the survey, wiring up the emails, integrating the CRM. That's the part that took a working day and made hiring an agency feel reasonable at \$10,000.

Perspective + Claude MCP collapses all of it into one prompt. The execution gap is gone. What's left is the only part that actually matters: which audience, which offer, which voice. That's the part only you can supply.

One funnel. One prompt. One published URL. That's all it takes to start.