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Build a Lead-Qualifying Funnel with Claude

Every prompt and setup step from the video, ready to copy and paste

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Start Here

This is the exact build from the video, step by step. Every prompt is copy-paste ready. Swap the placeholders in [brackets] for your own details and you'll end up with the same funnel.

> 🎯 **WHAT YOU'LL GET**
> A qualifying quiz funnel that sorts your replies into two groups, sends the good ones to your calendar, sends everyone else a free resource, and follows up with both groups automatically.

> 💡 **TIP**
> If something here feels technical, you can always just paste the whole step into Claude and ask it to walk you through it.

> ⚠ **WATCH OUT**
> This guide assumes you've already got the lead-gen system from Part 1 running. This funnel is the missing piece that goes after it, not a replacement for it.

PART 1

Four Things to Set Up

One-time setup, about five minutes total.

SETUP

Do these once, in order

1. **Create a Perspective account**
   This is the AI funnel builder we're using. Use this link and you get a 30-day trial instead of the usual 14: [YOUR PERSPECTIVE LINK].
2. **Connect it to Claude**
   In Claude, click Connectors, then Browse connectors. Search for Perspective and click Connect. Takes about 30 seconds, and you only do it once.
3. **Set up a sender email**
   In Perspective's workspace settings, add a sender address. Without this, your automated emails get built but can't actually send. The default workspace address works right away, that's the fast option. Or add your own domain if you want emails coming from your own address.
4. **Set up your calendar**
   Perspective doesn't have its own calendar, so you'll embed whatever booking tool you already use. Create an event (in Cal.com or similar) and copy the inline embed code. You'll need it in Part 5.

> The name of the event doesn't matter. Call it whatever you want, nobody sees the name.

PART 2

Build the Funnel

One prompt builds the whole thing.

PROMPT 1

Paste into Claude

This one prompt builds the landing page, all five questions, the routing logic, and the branding. It looks long, but that's only because it's specific.

✍ **TRY THIS PROMPT**

“Use the Perspective MCP to build a multi-step book-a-call funnel for [YOUR BUSINESS / WHO YOU HELP].

Goal: qualify replies to my cold outreach and book calls with the serious ones.

Flow:
(1) Landing page with a Start button. Headline promises a fast, honest answer on whether this is a fit. Mention it takes about 20 seconds.
(2) Five qualifying questions, ONE PER SCREEN, mobile-first, auto-advance:
Q1 "Are you the decision-maker for your business?"
Yes / Yes, together with my team / No, someone else decides
Q2 "How many [people/agents/staff] are on your team?"
Just me / 2-5 / 6+
Q3 "What is one closed deal worth to you?"
Under $5k / $5k-15k / $15k+
Q4 "When do you want an automated lead system running for your business?"
This month / Next few months / Not yet, just looking
Q5 "What have you already tried to get more leads?"
Nothing yet / A virtual assistant / Another tool
(3) Opt-in capturing name and email.
(4) Routing. QUALIFIED = decision-maker is Yes or Yes-with-team, AND deal value is $5k-15k or $15k+, AND timeline is This month or Next few months. Qualified people go to a booking page. Everyone else goes to a resource page with a button linking to [YOUR FREE RESOURCE / OFFER LINK]. Word that page warmly, not as a rejection.

Audience: [WHO REPLIES TO YOUR OUTREACH]. They know what [YOUR SERVICE CATEGORY] is. They don't want hype.

Voice: direct, plain-spoken, no hype. Short sentences. No idioms - it must read the same way to a non-native English speaker.

Match my brand from the screenshot I'm attaching.”

💡 **TIP**

> Don't describe your brand colors in words. Screenshot your own website and drag it into Claude alongside this prompt. It picks up your colors, fonts, and style from the image. No site yet? Just describe it instead — dark background, this color for buttons, clean sans-serif font.

> 💡 **TIP**
> Don't know what to ask people? Tell Claude what you sell and who you sell to, and ask it to write five qualifying questions for you. Then edit from there.

> 👀 **WHAT IT LOOKS LIKE** — *what happens next*
> **You:** paste the prompt, attach your screenshot, hit enter.
> **Claude:** builds the whole funnel through the Perspective MCP.
> Real build time in the video: usually 6 to 11 minutes. It can be worth a coffee break.

PART 3

Edit It Yourself

Not everything needs a prompt.

PROMPT 2

The one that shows the problem

Try asking for a small change first, so you can see what happens.

✍ **TRY THIS PROMPT**

“Make the headline on the first page more compelling and benefit-driven.”

⚠ **WATCH OUT**

Watch what it changes. Small prompts like this can rewrite things you didn't ask it to touch. That's normal, and it's exactly why the next part matters.

What you can change by hand, no prompt needed

- Any text on the page — just click it and type.
- Colors — click the element and change it.
- Section order — drag a section up or down the page.

None of that needs a prompt. You do it directly, the same way you'd edit a document.

What still needs AI

Adding a whole new question or a whole new page. For that, go back to Claude, or use Perspective's own AI chat right inside the editor.

PROMPT 3

Paste into Perspective's AI chat, not Claude

✍ **TRY THIS PROMPT**

“Add a question at the end of the quiz: "How did you find us?"
Options: Email, Google, YouTube, Other.”

PART 4

Embed Your Calendar

So people can book without leaving the page.

PROMPT 4

Paste into Perspective's AI chat

Your booking page doesn't have a live calendar yet. Grab the embed code you saved back in Part 1, and use this prompt to wire it in.

✍ **TRY THIS PROMPT**

“On the booking page, embed my [YOUR BOOKING TOOL] booking widget inline so people can pick a time without leaving the page. Here is the embed code:

[PASTE YOUR CALENDAR EMBED CODE]”

💡 **TIP**

Publish and test it yourself once this is in. It should prefill with the name and email your test lead already gave in the opt-in step, so nobody has to type it twice.

PART 5

The Follow-Up Emails

Two sequences, split by how people answered.

PROMPT 5

Paste into Claude

Right now the funnel captures people and nothing happens after that. This builds the two automated sequences: one for people who qualify, one for people who don't.

✍ **TRY THIS PROMPT**

“Use the Perspective MCP to add two email sequences to this funnel.

My booking link: [YOUR BOOKING LINK]
My resource link: [YOUR FREE RESOURCE / OFFER LINK]

Sequence one, for qualified leads. Three emails:
- Immediately: what I would fix first based on their answers. Useful content, not a pitch. End with a PS linking to my booking link.
- After 2 days: the first thing I check on every client's setup. Useful content, same PS with the booking link.
- After 4 days: why good leads still go cold. Useful content, same PS.

Sequence two, for unqualified leads. Two emails:
- Immediately: tell them a call doesn't make sense right now, but here's something useful. Link to my resource.
- After 5 days: point them to where to start with that resource, plus a line that they can book a call any time if their situation changes.

Both sequences trigger on new contacts. Use my workspace sender address.
Voice: direct, plain, no hype. Short sentences, no idioms.
Do not put personalization tokens in the subject lines.”

⚠ **WATCH OUT**

Perspective doesn't substitute {{tokens}} in subject lines, only in the email body. Keep any personalization out of the subject or it will show up literally, like {{name}}, in the recipient's inbox.

One thing you have to set by hand

Who gets which sequence isn't something you can prompt for. In Perspective, open each sequence and click the rules field next to the trigger. This opens Automation Logic, where you set the conditions.

👀 **WHAT IT LOOKS LIKE** — *qualified sequence — set to AND*

Decision maker is none of "No, someone else decides"
AND deal worth is none of "Under $5k"

AND timeline is none of "Not yet, just looking"

👀 **WHAT IT LOOKS LIKE** — *unqualified sequence — set to OR (the opposite)*

Decision maker is exactly "No, someone else decides"
OR deal worth is exactly "Under $5k"
OR timeline is exactly "Not yet, just looking"

💡 **TIP**

Test this with a real submission before you trust it. Use an email alias like yourname+test1@gmail.com — it lands in your normal inbox, but Perspective treats it as a brand new contact each time, so you can retest as many times as you like.

PART 6

Wire It Into Your Outreach

The last piece.

PROMPT 6

Paste into Claude Code, in your outreach project

The funnel link has to go into the messages your existing outreach system is already sending.

> ✍ **TRY THIS PROMPT**
>
> *"Update the outreach message template so the call to action is the qualifier funnel link instead of asking for a call. Use this exact line at the end:*
>
> *see if this is a fit → [YOUR FUNNEL LINK]*
>
> *Keep the rest of the message as it is."*

The wording matters. "Are you free for a call?" asks a stranger for a favor before they know who you are. "See if this is a fit" lets the reply sort itself, before it ever reaches your inbox.

TWO HONEST THINGS

Worth knowing before you build this

It's a funnel platform with a lead CRM built in, not a full pipeline tool. It handles the funnel and hands the lead over. It's not a HubSpot or Salesforce replacement.

The follow-up emails run on a schedule and can't detect a booking. Write them as useful content, not "did you book yet?" chasers, and end each one with a line like "if you've already booked, ignore this."

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