Solopreneur Solution Show

FREE GUIDE · FOR SERVICE SOLOPRENEURS

How to Use Claude as Your CRM in an Afternoon

Ditch the $99/month software you never open. By 5pm today, Claude will know every client you have, tell you who needs attention, and draft your follow-ups for you.

Why your CRM should be Claude

If you're a coach, consultant, therapist, designer, or freelancer, you've probably tried a "real" CRM. And it probably went like this: two enthusiastic weeks of data entry, then a slow death by neglect, plus a monthly charge you keep forgetting to cancel.

Here's the truth nobody selling CRM software will tell you: **a business of one doesn't need pipeline software built for a 40-person sales team.** You need three things:

- **One place** that remembers every client, conversation, and promise you've made
- **A quick answer** to "who needs my attention this week?"
- **Help writing** the follow-ups you keep putting off

Claude does all three — conversationally, with zero forms to fill out. Instead of clicking through fields and dropdowns, you paste in an email thread or type "just got off a call with Dana, she wants to start in September" and your CRM updates itself.

> **What makes this work is Claude Projects.** A Project is a persistent workspace with its own knowledge files and instructions. You'll create one Project called "Client CRM," teach it how your business works, and keep your client roster in it. Every conversation inside that Project starts already knowing your clients.

What you'll have by 5pm

- A Claude Project that acts as your CRM home base
- A structured client roster covering every active and prospective client
- A repeatable way to capture new leads and notes in seconds
- A weekly review ritual that surfaces who needs follow-up — with the emails already drafted

The afternoon plan

All you need: a Claude account (claude.ai — Projects are available on paid plans), your client info wherever it currently lives, and four focused hours. Phone on Do Not Disturb. Here's the schedule:

1:00 pm

Set up your CRM Project

Create the "Client CRM" Project in Claude and give it instructions that teach it your business. (~30 min)

1:30 pm

Build your client roster

Brain-dump every client and prospect you have — Claude structures the mess into a clean roster file. (~60 min)

2:30 pm

Set up intake capture

Practice the paste-and-log habit: emails, call notes, and DMs go in; structured client updates come out. (~45 min)

3:15 pm

Run your first weekly review

Ask Claude who needs attention, pick your follow-ups, and have it draft every message. (~45 min)

4:00 pm

Send & systemize

Send the follow-ups (this is the part that makes money), then book a recurring 30-minute weekly review slot. (~60 min)

> **Ground rule for the afternoon:** done beats perfect. Your roster doesn't need every client from 2019 — it needs everyone you're working with now, everyone who might hire you in the next 90 days, and past clients worth reactivating.

1 Set up your CRM Project

In Claude (claude.ai), create a new **Project** and name it **Client CRM**. Then paste the template below into the Project's **instructions** — this is what turns a chat window into a CRM. Edit the bracketed parts for your business first.

PROJECT INSTRUCTIONS TEMPLATE

```
You are my CRM and client-management assistant. I'm a [YOUR PROFESSION — e.g. "massage therapist" / "marketing consultant"] working solo. My services: [LIST YOUR 2–4 SERVICES AND ROUGH PRICES].

The project file "client-roster.md" is my single source of truth about clients. When I give you new information about anyone (pasted emails, call notes, quick updates), respond with an updated roster entry for that person in the exact same format, so I can paste it back into the file.

My pipeline stages: Lead → Contacted → In conversation → Active client → Past client.

When I ask for a weekly review: list clients needing attention, ordered by urgency, each with a one-line reason and a recommended next action. Flag anyone I've promised something to.

When drafting messages: warm, professional, sounds like me — [PASTE 2–3 SENTENCES YOU'D ACTUALLY WRITE SO IT LEARNS YOUR VOICE]. Keep emails under 120 words unless I ask otherwise.
```

> **Why instructions matter:** without them, you'd re-explain your business in every chat. With them, every conversation in this Project starts as a briefing with an assistant who already knows your services, your stages, and your voice.

That's the whole setup. No fields to configure, no imports, no onboarding videos. Next: give your new CRM its data.

2 Build your client roster

Now the satisfying part. Open a chat inside your Client CRM Project and brain-dump every client you can think of — messy is fine, that's the point. Say it like you'd tell a friend:

YOUR BRAIN-DUMP (EXAMPLE)

```
Help me build my client roster. Here's everyone off the top of my head:

Dana R — monthly strategy client, $1,500/mo, been with me a year, mentioned wanting to add a second project in September. Mike T — did his website in March, went quiet, worth a check-in. Priya S — new lead from Instagram last week, asked about pricing, I never replied (oops). Leon & Casey — wedding clients, event is Oct 12, deposit paid, final payment due Sept 1...
```

Then ask Claude to structure it:

PROMPT

```
Turn everything above into a client roster in markdown. One entry per person with: Name, Stage, Service, Value, Last contact, Next action, Notes. Ask me about anything that's unclear or missing, then give me the complete file.
```

Answer its questions, then save Claude's output as **client-roster.md** and upload it to the Project's knowledge files. This file is now your CRM database — readable by you, understood by Claude.

> **Also raid your inbox:** search your email for the last 90 days of client conversations. Paste anything relevant into the chat and ask Claude to fold it into the roster. Ten minutes of pasting usually recovers two or three forgotten leads — people who asked about working with you and never got an answer.

3 Capture everything, effortlessly

A CRM dies the day updating it becomes a chore. So your only maintenance habit is this: **when something happens with a client, paste it into the Project and say "log this."**

AFTER A DISCOVERY CALL

```
Log this. Just got off a call with Priya S: she wants the full brand package, budget
around $3k, timeline is "before the holidays." Slight hesitation about price — she's
comparing me with one other designer. I said I'd send a proposal by Friday.
```

FORWARDING AN EMAIL

```
Log this email from Mike T: [PASTE EMAIL]. Update his entry and tell me if there's
anything I should act on.
```

Claude replies with the updated roster entry — paste it into **client-roster.md** over the old one (or re-upload the file Claude gives you). Fifteen seconds, done.

The habit that makes it stick

- **End of any client call:** 30 seconds of voice-typed notes → "log this"
- **New inquiry arrives:** paste it → "log this as a new lead, suggest my reply"
- **You promise anything:** "log this — I owe Dana the revised scope by Tuesday"

> **Bonus move:** that "suggest my reply" tail is the killer feature. New-lead emails get answered in two minutes instead of sitting in your inbox for a guilty week — and speed-to-reply is the single biggest thing that wins solopreneur work.

4 The weekly review that runs itself

This is where the CRM starts paying you. Once a week (book the same 30-minute slot every week — Friday morning works well), open the Project and run:

THE WEEKLY REVIEW PROMPT

```
Run my weekly review. From the roster: 1) Who needs attention this week and why — ordered by urgency. 2) Anything I promised and haven't delivered. 3) Leads going cold. 4) Anyone worth a reactivation touch. Then draft every message you recommend, ready to send.
```

Two minutes later you have a prioritized list *and* the drafts. Your job shrinks to: read, tweak, send. What used to be an afternoon of guilt is now half an hour of execution.

Make the drafts sound like you

The first week, edit the drafts and paste your edited versions back with: *"This is how I actually sent it — match this voice going forward."* By week three the drafts need almost no editing.

> **Reality check:** most solopreneurs who do this find 2–4 pieces of dropped revenue in the first review — an unanswered lead, an unsent proposal, a past client due for a rebook. One recovered client typically pays for years of your Claude subscription.

10 copy-paste CRM prompts

When you need to...	Say this in your Client CRM Project
Prep for a call	"Brief me for my 2pm with Dana — history, open items, anything I promised, and two smart questions to ask."
Chase a proposal	"It's been 6 days since I sent Priya the proposal. Draft a friendly nudge that doesn't sound desperate."
Reactivate past clients	"List past clients inactive 90+ days. Draft a personal check-in for each — reference our last project, no hard sell."
Say no gracefully	"This inquiry isn't a fit: [PASTE]. Draft a warm decline that keeps the door open and refers them elsewhere."
Raise a price	"Draft a rate-increase note for my monthly clients: from $X to $Y starting [DATE]. Confident, grateful, no over-apologizing."
Spot revenue	"Look at the roster: where's the easiest additional revenue in the next 30 days? Rank the top 3 with reasoning."
Handle a late payer	"Leon & Casey's final payment was due Sept 1. Draft escalating reminders: day 3 gentle, day 10 firm, day 21 final."
Ask for referrals	"Which 3 clients are happiest right now? Draft a personal referral ask for each, naming who I love working with."
Collect a testimonial	"Draft a testimonial request for Mike — remind him of results we got, and include 3 questions so it's easy to answer."
Get back on the wagon	"I ignored this CRM for 3 weeks. Here's what happened: [DUMP]. Update everything and tell me the 3 most urgent actions."

The 5 o'clock checklist

You're done when you can tick every box:

- [ ] "Client CRM" Project exists with customized instructions (Step 1)
- [ ] **client-roster.md** is in the Project files and covers every current client, warm lead, and reactivation-worthy past client (Step 2)
- [ ] You've logged at least one real email or call note with "log this" (Step 3)
- [ ] You've run one weekly review and **sent at least one follow-up from it** (Step 4)
- [ ] A recurring 30-minute "CRM review" sits in your calendar

That last send matters most. A CRM that produces sent messages is a system; anything else is a filing cabinet.

Want the full build, not just the afternoon version?

This guide gets your CRM running. The **Claude CRM VIP Guide** turns it into a complete client-management system: full pipeline stages with lead scoring, intake forms that feed Claude automatically, follow-up sequences, spreadsheet/CRM data migration, a 40+ prompt library, and detailed instructions for every single step.

→ Details at solosolutionshow.com/vip