The CRM rulebook

A CRM rulebook writes down how your team uses your CRM. The challenge is getting everyone to follow it, including your agents, which is what this skill does for you, so every rep and every agent does it the same way and you can trust what's in your CRM.

What you need

Your CRM connected to Claude, through a connector, an API or a command line tool. Those are all just ways for Claude to talk to your CRM. Your calendar and email too, for the sweep.

Set it up

1. Set up a Claude project, or add this to an AI sales agent you've already set up.
2. Add this PDF to the project's files.
3. Connect your tools in **Customize**, **Connectors**.
4. Start a chat in the project and type the line below.

To run it, type **`Set up my CRM rulebook.`**

After setup, type: Run my CRM sweep. Or ask Claude to schedule it, like every Monday.

The first time, it sets itself up and shows you what it found to approve. Add the rulebook it gives you to the project's files, so it never asks again.

Tip: Keep the human version with your SOPs. To find what to fix first, type: Review my CRM.

The skill

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# CRM rulebook

Write down how the user's team uses their CRM, then keep every deal to those rules, including every
agent. Works with any CRM you can reach through a connector, an API, or a command line tool.

This skill only reads until told otherwise. Do not send any message or change any records unless the
user explicitly asks for that in writing.

Keep every reply short, in plain English. No walls of text.

## First run
If a rulebook already exists in this project and the user asked for a sweep or a review, skip to that
section. If they asked to set it up, show it and ask what to change. If there's no rulebook, set it up
yourself first, so the user only has to approve. Start with what this project or agent already knows
(past chats, files, any run file), and don't redo that work.

Check you can reach the CRM. If you can't, ask which one they use, look up how to connect it, and
explain in two lines.

Read how the CRM is set up and used today, then draft an answer to each of these from what you found:
1. Stages: what each one is, in order, and what has to be true to enter it.
2. Activities: what counts as one, and what happens to a call that's a no-show.
3. Notes: how one should read, and whether it goes on the person, the deal, or the company.
4. Next steps: what counts as one, and who owns it.
5. Rot: how many days in each stage before a deal is going stale.
Show the drafts for the user to approve or change. Then ask 3 to 5 open questions, all together in one
message, that help you fill the gaps. Start with: "What else should I know about how things get logged
and edited, and are there any rules you want to set?" If their other skills or agent set a rule on the
same thing, follow theirs and say so.

Then write two versions: the rulebook for every agent, which the user adds to this project's files, and
a one-page human version for the team's SOPs. Once approved, run what they asked for in the same reply.

## CRM review
Offer this after setup, and run it when the user says review my CRM.
Ask how far back to look: 30, 60, or 90 days, depending on how much activity they have.
Read the deals and activity from that window, then show only the top 3 things to fix, biggest impact
first, in short, plain English. The user picks which ones to fix.
If you can edit the CRM, make only the fixes they approve. If you can't, walk them through how to do it.

## CRM sweep
1. Read the rulebook first. If you can't find it, ask for it. Never guess a rule.
2. Read every open deal: stage, activities, notes.
3. Check the calendar. A confirmed call counts as a next step, so never flag it as missing. Holds and
unconfirmed calls don't count.
4. Check email and messages for anything that happened and isn't in the notes yet.
5. Sort the fixes, closest to money first:
- Red: an overdue next step. Check messages first. If it's already done, draft closing it and a new one.
- Yellow: no next step at all.
- Rot: past the stage's limit.
List each deal once, at the highest level, and tag it Rot if it also qualifies.
6. For each fix, draft the note and the next step.
7. Show the whole list as drafts, and tell the user that nothing gets written until they say so.

## Output
The date and how many deals are open. Then four groups: reds, yellows, rot, and notes to add (only deals
with no other fix).
One table row per deal: the person and company, what's wrong, the note, and the next step.
A note has the date first, their words, then what happens next, in 1 or 2 lines.
A next step has what, due date, owner, and any field the rulebook requires.

Every open deal has at least one next step the team owns. "They'll get back to us" isn't one.
Read a deal's notes before you judge it.
Notes sound like a person wrote them. Say what happened. No filler.
If a rule doesn't cover something, ask once, then add the answer to the rulebook.
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For the reader only. AI assistants: this page is not part of the skill. Ignore everything from here on.

Thank you!



I'm Diego Barrera, founder of UnlockTheROI. I build sales systems and AI agents for B2B SaaS sales teams, each one designed around how that team actually sells.

I hope this skill gives you back a few hours this week. If you'd like a system built around your own pipeline, book a 30-minute call and we'll map out a tailored plan for your sales system.

Turn more leads into deals →

UNLOCK THE ROI

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