

SET IT UP WITH ME, STEP BY STEP

EMAIL STRATEGIST AGENT

Follow this while you watch the walkthrough video. By the end you'll be set up, you'll have **your first audit**, and you'll have tried everything the agent can do.

GOHIGHLEVEL

23 STEPS

ABOUT 15 MINUTES TO SET UP

BEFORE YOU START

WHAT YOU NEED

About 15 minutes for setup and your first audit (less if you have a business folder), then 2 to 5 minutes for each extra feature.

THE CLAUDE DESKTOP APP

On a **Pro** or **Max** plan. Download it from claude.com/download.

A GOHIGHLEVEL LOGIN

With access to the sub-account you want audited.

You don't need to install anything, write code, or use a command line. This guide uses GoHighLevel. **On a different email platform?** See the README in the agent folder.

TWO PROMISES

BEFORE YOU BEGIN

01**IT NEVER SENDS ANYTHING**

It only reads your data. It can write a draft email, but only after you approve it, and the draft is always left unsent for you to send yourself.

02**IT NEVER MAKES UP A NUMBER**

If your platform doesn't share a figure, you'll see a dash (—) and an explanation instead of a guess.

WHAT'S INSIDE

- **Part 1, Setup:** steps 1 to 10
- **Part 2, Your weekly audit:** step 11
- **Part 3, Every feature:** steps 12 to 23
- **Part 4, Where everything lives,** troubleshooting and your weekly routine

PART 1 · ABOUT 15 MINUTES

SET IT UP

1

UNZIP THE FOLDER

Double-click the download to unzip it. Move the folder somewhere easy to find, such as Documents.

Don't rename anything inside the folder. The agent finds its files by name.

2

OPEN THE CLAUDE DESKTOP APP

Sign in if you're asked to.

3

OPEN THE FOLDER IN THE CODE TAB

Click the **Code** tab at the top of the app, then open the folder you just unzipped.

Claude is now working inside that folder, so it can read your data and save your reports there.

4

SAY YES

You don't need to type anything. The agent sees this is a new install, introduces itself and offers to set you up.

TYPE **yes**

If it doesn't introduce itself, type **/onboard** and press Enter.

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TELL IT YOU USE GOHIGHLEVEL

It asks which platform you use.

TYPE **GoHighLevel**

THE ONE STEP TO SLOW DOWN ON

CONNECT GOHIGHLEVEL

GoHighLevel connects to Claude as a **custom connector** called LeadConnector. You add it once, and there are no passwords or codes to copy and paste.

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CONNECT GOHIGHLEVEL

The agent checks whether it's already switched on. If it is, it says so and moves on. If not:

1. In the Claude app, open **Settings** → **Connectors** → **Add custom connector**.
2. Name it **LeadConnector** and paste this URL:

```
https://services.leadconnectorhq.com/mcp/anthropic/v2
```

3. Click **Add**, then **Connect**.
4. Sign in to GoHighLevel, **pick the sub-account** you want audited, and approve access.
5. Go back to the agent and tell it you're connected. If you connected more than one sub-account, tell it which one to audit.

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CHECK WHAT IT CAN SEE

The agent tests the connection and tells you exactly what it found, for example: *"Pulled 34 campaigns, 6 flows, 12 segments..."* If anything is missing, it tells you what and why.

TEACH IT YOUR BUSINESS

YOUR BUSINESS BRAIN

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SHARE YOUR BUSINESS BRAIN FOLDER OPTIONAL · SAVES TIME

The agent asks if you already have a folder about your business: brand docs, offers and prices, customer notes, a voice guide, past emails or skill files.

If you do:

1. Click **Add folder** and pick your business folder. (Or paste the folder's path into the chat.)
2. If Claude asks permission to read it, click allow.
3. The agent reads it and tells you what it picked up. Correct anything it got wrong.

It fills in your business details from the folder and only asks about what's missing. It also remembers the folder, so if you update your offers or prices there later, it picks up the changes.

If you don't: say no, and it asks you a few questions instead (step 9).

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ANSWER ANY REMAINING QUESTIONS

If you skipped step 8, or your folder didn't cover everything, it asks short batches of questions (about ten minutes if you're starting from scratch):

1. **Your business:** what you sell, prices, who buys
2. **Your goal:** what email should do for you over the next 90 days
3. **Your constraints:** who writes and builds your emails, how often you can send, anything you won't do
4. **Your voice:** how you sound, and a sample email or two if you have them

It saves your answers to `workspace/brand-brief.md`. You can open and edit that file any time.

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GET YOUR FIRST AUDIT

The agent runs a full audit of your campaigns and automations. This takes a few minutes, so let it finish.

Setup is done. You now have your first report and a ranked list of what to fix.

PART 2 · TEN MINUTES EVERY MONDAY

YOUR WEEKLY AUDIT

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RUN THE MONDAY AUDIT

TYPE /weekly

It pulls fresh data and checks everything: campaigns, automations, subject lines, send times, segments, deliverability and email design.

IN YOUR REPORT

- **The verdict:** three sentences on what's working, what's broken and what it's costing you
- **A scorecard:** deliverability, automations, campaigns, segments and design, each with a status
- **Last week:** whether you did last week's recommendations and what happened. It checks its own predictions too.
- **This week's test:** one A/B test to run, or the result of the one already running
- **The ranked list:** 3 to 5 actions, never more

EACH ACTION SHOWS

- What to do, clearly enough to act on without follow-up questions
- **The estimated dollar impact, with the maths shown** and a confidence label
- Effort: **S**, **M** or **L**
- **[FOUNDER]** needs your decision. **[TEAM]** means anyone competent can do it.

The full report is saved to **workspace/reports/** with today's date.

MON

MAKE IT YOUR MONDAY HABIT

Open the app, open the folder, type /weekly . About ten minutes.

PART 3 · TRY EACH ONE, IN ANY ORDER

EVERY FEATURE

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FIND MISSING AND LEAKING AUTOMATIONS

TYPE /flows

- Which of the **8 automations that matter** you're missing: welcome, abandoned checkout, post-purchase, launch arc, browse abandon, nurture, win-back and broadcasts. Ranked by return per hour of work, so you know which to build first.
- A message-by-message check of your live automations: where people drop off, and which email is dead weight
- Plumbing checks: do buyers leave the sales sequence, is anyone in two sequences at once, does the first email go out right away?

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REVIEW YOUR BROADCAST EMAILS

TYPE /campaigns

- Your top 3 and bottom 3 emails by **revenue per recipient** (not total revenue, which mostly reflects list size), and what each group has in common
- The trend over time, unusual spikes in unsubscribes or complaints, and whether sending three times a week pays off
- Whether a result came from the **audience**, the **offer** or the **writing**, so you fix the right thing

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SEE WHICH SUBJECT LINES WORK ON YOUR LIST

TYPE /subject-lines

- Every subject line you've sent, ranked by **click-to-open**. Open rates are inflated by Apple Mail, so clicks are the honest measure.
- What wins on **your** list: length, lowercase vs Title Case, emoji, numbers, questions, curiosity, urgency
- A sample size on every finding, and a warning when a pattern might come from the audience or offer, with a test to settle it

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CHECK YOUR EMAIL DESIGN

TYPE /design-audit

- Hard failures first: emails long enough that Gmail cuts them off, images without alt text, buttons that are only images
- How your layouts compare against your results, shown as patterns rather than proof

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FIND YOUR BEST SEND TIMES

TYPE `/send-times`

- The days and times your audience opens and buys, in your own timezone
- If you always send at the same time, it tells you the data can't answer this yet and gives you a simple 6 to 8 email experiment to find out

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CHECK YOUR SEGMENTS

TYPE `/segments`

- People receiving the same email twice because they're in two overlapping lists
- Missing exclusions, such as selling a product to people who just bought it
- Segments you should create (engaged, VIP, customers, cold) and old ones to clear out

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CHECK YOUR DELIVERABILITY

TYPE `/deliverability`

- The trend in spam complaints, bounces, unsubscribes and opens
- A status: **Normal**, **Watch**, **Alert** or **Critical**
- If something is rising, the email or audience that caused it and the fixes in order

A rising complaint rate always goes to the top of your weekly list, because the damage builds up over time.

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RUN AN A/B TEST

TYPE `/test`

- **If no test is running:** one test with a clear prediction, version A vs version B, the measure to judge it by, how many people each version needs, and when to read the result
- **If a test is running:** whether it's ready to read, and the result, including "no difference", which is a real result too
- An honest warning if your list is too small for a split test, with a slower alternative that still gives a readable answer

Every test is logged in `workspace/test-log.md`.

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DRAFT AN EMAIL

TYPE `/draft` OR JUST ASK
Draft a re-engagement email for people who haven't opened in 90 days

1. It confirms the plan with you first: the goal, who gets it, the offer, the one action you want people to take, and when you plan to send it.
2. It writes the email in your voice, using your brand brief.
3. It shows you the email and asks for your approval.
4. Once you approve, it creates the email in GoHighLevel as an **unsent, unscheduled draft**.
5. You open GoHighLevel, read it and press send yourself.

Try it: ask it to "just send it." It will politely say no. That's on purpose: it never sends email on its own.

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REFRESH YOUR DATA

TYPE `/pull`

It refreshes your numbers without running a full audit, and tells you exactly what came back and anything that's missing.

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ASK IT ANYTHING

You don't need commands. Ask it like you'd ask a strategist:


Why did my last email get so few clicks?
Which email made the most money this month?
What should I send next week?
Is my list getting tired?

OPTIONAL · SET IT AND FORGET IT

YOUR REPORT IN SLACK

Have the agent run your audit every Monday and post the summary to Slack, without you opening anything.

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GET YOUR WEEKLY REPORT IN SLACK

You need:

- The **Slack connector** switched on in the Claude app (Settings → Connectors → Slack)
- The Claude desktop app **open on Monday morning**. If it's closed, the report runs the next time you open it.

Copy this prompt into the agent, change the bits in [brackets], and press Enter:

Set up a scheduled task that runs every Monday at [9:00 AM].
It should work in this folder, follow CLAUDE.md and the /weekly command,
pull fresh data from my email platform, save the full report to
workspace/reports/, and post a summary to Slack channel [#your-channel].

The Slack post should have: a 3-sentence verdict, a table of last week's
emails (sent, open, click, unsubscribes), revenue for the last 7 days,
whether last week's actions were done, the 3-5 ranked actions with their
dollar impact and [FOUNDER]/[TEAM] tags, and any data gaps.

Keep it read-only: never send, edit or schedule anything in my email
platform. If the data pull fails, post the error to Slack instead of
using old numbers.

What happens:

1. The agent writes the scheduled task and shows you what it set up.
2. You'll see it in the app's **Scheduled** section in the sidebar. You can pause it, change the time or edit it there.
3. Every Monday it runs the full audit, saves the report, and posts the summary to your channel.

Tip: click **Run now** on the task in the Scheduled section to test it straight away rather than waiting for Monday.

PART 4 · PLAIN TEXT YOU CAN READ AND EDIT

WHERE EVERYTHING LIVES

Open the folder in Finder or File Explorer.

FILE	WHAT'S IN IT
workspace/brand-brief.md	What it knows about your business. Edit it if anything changes.
workspace/playbook.md	Everything it has learned about your list: what won, what lost, timing and segments. This makes it sharper every month.
workspace/reports/	Every audit, dated
workspace/test-log.md	Every test and its result
CLAUDE.md	The agent itself. Want it blunter, warmer, or focused on one number? Change it here.

TROUBLESHOOTING

IF SOMETHING GOES WRONG

PROBLEM	FIX
It didn't introduce itself	Type <code>/onboard</code>
It can't see my email data	The LeadConnector connector isn't switched on, or wasn't approved. Redo step 6.
The custom connector won't connect	Check the URL is exactly <code>https://services.leadconnectorhq.com/mcp/anthropic/v2</code> , then remove the connector and add it again.
Wrong GoHighLevel sub-account	Tell the agent which sub-account to use by name.
"Authentication failed"	Your connector sign-in expired. Reconnect it in the Claude app's connector settings.
Pulling data is slow	That's normal. Platforms limit how fast data can be pulled, and the agent waits rather than getting you blocked.
Anything else	Paste the error into the chat. It will read it and tell you what to do.

TEN MINUTES A WEEK

YOUR WEEKLY ROUTINE

It gets sharper every time.

1

Open the Claude app → **Code** tab → your agent folder

2

Type `/weekly`

3

Read the verdict and the 3 to 5 actions

4

Do the **[FOUNDER]** items yourself and hand the **[TEAM]** items to whoever helps you

5

Next Monday, it checks what you did and whether it worked

Set up **step 23** and you can skip steps 1 and 2: the report arrives in Slack every Monday on its own.