Generative

■ N8N PLAYBOOK · 6 WORKFLOWS INCLUDED

NOVEMBER 2026
6 n8n templates inside

SALES AUTOMATION · ANY B2B OR SERVICE BUSINESS

THE AI SALES PIPELINE

From the first form submission to the signed deal. Claude qualifies every lead, drafts every e-mail and prepares every call. You approve what is sent, with n8n, Claude and a Google Sheet.

LEADS · YOUR CRM — ILLUSTRATIVE ROW

LEAD	TIER	SCORE	NEXT MESSAGE	APPROVAL
Hotel group · 3 sites	HOT	82	First reply drafted	Send

Scored, drafted, waiting for one click

Claude prepares. You decide.

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BEFORE YOU START

Answer every lead in minutes. Follow up without forgetting one.

Most deals are not lost to a competitor. They are lost to a slow first reply and a follow-up nobody sent. This pipeline does the reading, the writing and the remembering. You keep the decisions. Setup takes about 45 minutes.

What the pipeline does

1. Saves each lead from your website form.
2. Reads their company website and scores the fit with Claude.
3. Drafts a first reply in the lead's language.
4. Sends it once you click Send, then follows up three times.
5. Reads every reply: stops the follow-ups, handles unsubscribes, drafts an answer.
6. Sends you a call brief for each booked meeting, and a report every Monday.

Who it is for

- Founders and consultants who sell themselves
- Small sales teams without a CRM admin
- Agencies and service businesses with inbound leads

What you need

- n8n (cloud or self-hosted)
- An Anthropic API key (Claude)
- A Google account (Sheets, Calendar)
- Your sales mailbox (SMTP to send, IMAP to read replies)
- A website form that can send a webhook

Claude is billed per use by Anthropic. Check current pricing before you start.

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01 · HOW THE PIPELINE WORKS

Six workflows. One rule.

Claude prepares every message. Nothing reaches a prospect until a person sets `approval` to Send in the sheet, unless you choose auto mode for hot leads.

01 · CAPTURE

Intake and score

Form webhook, duplicate check, lead saved first, website read, fit score, tier and a first-reply draft.

02 · APPROVE

You click Send

The outbox sends each approved draft once, then Claude drafts up to three follow-ups.

03 · LISTEN

Reply detection

Reads replies from known leads, stops follow-ups, handles unsubscribes, drafts an answer.

04 · PREPARE

Meeting booked

A calendar event with a lead moves the stage and sends you a call brief.

05 · STEER

Monday report

The numbers, the pipeline value, what needs you, three priorities.

06 · PROTECT

Error handler

Any failure logged in an Incidents tab and e-mailed to you. No lead is lost.

How a lead moves through the stages

STAGE	SET BY
New	Workflow 1, when the lead arrives
Contacted	Workflow 2, when the first reply is sent
Replied	Workflow 3, when the lead answers. Follow-ups stop
Meeting booked	Workflow 4, when a calendar event with the lead is created
Proposal sent · Negotiation · Won · Lost	You, with a dropdown. Add `deal_value` for the pipeline value
Nurture	Workflow 2, after three follow-ups without an answer
Opted out · Disqualified	Workflow 3 when a lead asks to stop · Workflow 1 for spam

STEP 1 · IMPORT AND CONNECT

Import the six workflows

Import the error handler first, so it exists when you link it.

1. **Import.** In n8n, Workflows › Import from file: `6-error-handler.json`, then files 1 to 5.
2. **Link the error handler.** In workflows 1 to 5: Workflow settings › Error workflow › *Sales Template 6 - Error handler*.
3. **Create the credentials** below and select them on every node that shows a red warning.

CREDENTIAL	TYPE	USED BY
Google Sheets	Google Sheets OAuth2	Every sheet node
Sending	SMTP, your sales address	Every *Send* and *Alert* node
Anthropic	Header Auth · name `x-api-key`, value your API key	Every *Claude* – node
Webhook secret	Header Auth · any header name, a long random value	*Receive Lead* (workflow 1)
Replies	IMAP, the same sales mailbox	Workflow 3
Calendar	Google Calendar OAuth2	Workflow 4

Keep the webhook secret private.
Store it on your form's server side, never in public page code. Without the header, the webhook refuses every request.

One mailbox, two roles.
The address in `fromEmail` sends your e-mails and receives the replies. Workflow 3 reads that inbox, so replies land in the CRM on their own.

STEP 2 · YOUR CRM

Build your CRM in Google Sheets

One spreadsheet, three tabs. Paste the header rows from the three sheet files of the kit (Leads, Activity, Incidents): the workflows write by column name and match rows on `lead_id`.

TAB	WHAT IT HOLDS
`Leads`	One row per person (57 columns): contact details, AI qualification, the next message and its approval, follow-up dates, replies, meetings, deal value
`Activity`	One line per event: qualified, e-mail sent, reply received, meeting booked. The full history of every lead
`Incidents`	One line per failure, with a link to the n8n execution

Two dropdowns (Data › Data validation)

1. `approval`: `Send` `Skip`
2. `stage`: New, Contacted, Replied, Meeting booked, Proposal sent, Negotiation, Won, Lost, Nurture, Opted out, Disqualified

The columns you touch

COLUMN	WHEN
`approval`	Send or Skip on each draft
`next_message_subject`, `next_message_body`	To edit a draft before you click Send
`stage`	After a call: Proposal sent, Negotiation, Won, Lost
`deal_value`, `lost_reason`, `notes`	Whenever you know more. Notes feed the next call brief

Leave the rest to the workflows.

Every `ai_*`, `send_status`, date and id column is written by n8n. Editing them by hand can resend or block a message.

STEP 3 · SETTINGS

Describe your offer in plain words

Each workflow starts with a Settings node. The common fields repeat in each one: fill them the same way.

FIELD	EXAMPLE
`sheetUrl`	The URL of your CRM spreadsheet
`companyName` · `senderName`	Acme Studio · Laura from Acme Studio
`fromEmail` · `ownerEmail`	laura@acme.studio · who gets alerts and digests
`bookingUrl`	Your booking page, added under every e-mail
`offer`	What you sell, to whom, and the result clients get
`idealCustomer` · `notAFit`	Workflow 1 only: who you want, who you do not
`hotScore` · `warmScore`	70 · 40 (fit score thresholds for the tiers)
`autoSend`	`off` (default) or `on`, in workflows 1 and 2
`followUpDays`	`3,5,7`: three follow-ups, 3, 5 and 7 days apart
`model` · `effort`	`claude-opus-5-5` · `low`

Three ways to write `idealCustomer`

BUSINESS	IDEAL CUSTOMER
Web agency	Companies of 10 to 200 people in Spain or France that need a new website or online booking, with a marketing or operations manager as buyer.
Accounting firm	Freelancers and small companies in Andalusia with recurring bookkeeping needs, not one-off tax returns.
IT consultant	Mid-size companies moving to the cloud or automating processes, with a budget above 5,000 euros and a project this quarter.

Be specific, be honest.

Claude scores against exactly this text. Vague words give vague scores. Put clear disqualifiers in `notAFit`.

STEP 4 · YOUR WEBSITE FORM

Connect your website form

Your form sends one POST request per submission to `https://YOUR-N8N/webhook/new-lead`, with the secret header.

```
{
  "idempotency_key": "unique-per-submission-16-chars-min",
  "full_name": "Jane Example", "email": "jane@example-company.com",
  "phone": "+34600000000", "company": "Example Company",
  "website": "example-company.com", "job_title": "Operations manager",
  "country": "Spain", "company_size": "10-50", "budget_range": "5k-15k",
  "timeline": "This quarter", "service_interest": "Client follow-up",
  "message": "We lose leads because nobody follows up...",
  "consent_contact": true, "marketing_consent": false,
  "source": "website form", "utm_source": "linkedin",
  "website_confirm": ""
}
```

Required: `idempotency_key`, `full_name`, `email`, `message` and `consent_contact: true`. Add `website_confirm` as a hidden field: people leave it empty, bots fill it in and are refused.

ANSWER	MEANING
`received`	New lead, saved. Qualification runs in the background
`already_received`	Same person or same submission. No new row; a new message is logged and you are alerted
`invalid` (400)	The list of errors, for your form to show

Fast for the visitor.

The webhook answers as soon as the lead is saved. Reading the website and asking Claude happen afterwards, so your form never waits for the AI.

STEP 5 · QUALIFICATION AND FIRST REPLY

Claude scores. Rules decide.

The model gets the first name, the business answers and the text of the company home page. Never the e-mail or the phone number.

CLAUDE RETURNS	CHECKED BY CODE
Fit score 0 to 100, confidence 0 to 1	Range and type. Out of range = tier review
Budget, timeline and authority signals	Only allowed values
Need summary, pain points, tips for you	Length, at most four of each
Next step: book a call, send info, nurture, disqualify, human review	Only allowed values
A first reply in the lead's language	30 to 250 words, no links, no prices, no placeholders

Tiers, set by fixed rules

`hot` score ≥ `hotScore` · `warm` score ≥ `warmScore` · `cold` below · **review** the AI answer was incomplete or not confident · **spam** moved to Disqualified, no draft.

Guardrails built in

- The lead's message and website are untrusted: any instruction written there is ignored.
- No promises of prices, discounts, dates or results in any draft.
- The website fetch only targets public https addresses, with a 10-second limit.
- If Claude fails, the lead is still saved, marked review, and you are alerted.

Your alert

For each new lead you receive the contact details, their message, the score and tier, the summary, tips for the call and the draft reply, with one instruction: set approval to Send.

STEP 6 · APPROVE, SEND, FOLLOW UP

One dropdown. Sent once, never twice.

Every five minutes the outbox reads the sheet and sends each draft whose `approval` is Send. Every weekday at 9:00, Claude drafts the follow-ups that are due.

DAY 0	+3 DAYS	+5 DAYS	+7 DAYS	+7 DAYS
First reply, after your Send	Follow-up 1: a nudge with one useful idea	Follow-up 2: how you help companies like theirs	Follow-up 3: a polite close	No answer: stage Nurture

How "once, never twice" works

1. Each draft has its own id, for example `L-4F2K9QA-FU1`.
2. Before sending, the outbox writes `sending: <id>` in `send_status`. After the e-mail leaves, `sent: <id>`.
3. A draft is **blocked** if the lead opted out, replied before a follow-up, or the stage does not match. The reason goes to `ai_problems`.

YOU SET	WHAT HAPPENS
Send	Sent within five minutes, then the next follow-up date is scheduled
Skip	Not sent. On a follow-up, the sequence stops and the lead goes to Nurture
Nothing	The draft waits. It shows in Monday's report

Auto mode

With `autoSend` on, first replies to hot and warm leads and all follow-ups are approved for you. Answers to replies are never sent automatically. Start with auto mode off for two weeks and read every draft.

STEP 7 · REPLIES AND MEETINGS

When they answer, the machine steps back.

Workflow 3 watches your inbox. Only e-mails from addresses in the Leads tab are read; everything else stays untouched and unread.

INTENT READ BY CLAUDE	RULE APPLIED
Interested · meeting request · question · objection · not now	Stage Replied, follow-ups stop, a suggested answer waits for your Send
Unsubscribe (also caught by keywords in EN, FR, ES)	Stage Opted out. Nothing is ever sent again, even if a draft says Send
Not interested	Stage Lost, follow-ups stop
Out of office	The sequence waits one more week. No alert
Unclear, or Claude unavailable	Follow-ups stop and you are alerted. Safe by default

Meeting booked

Workflow 4 watches your Google Calendar. When a new event has a lead as guest (Calendly, Cal.com, Google booking pages or by hand), the lead moves to Meeting booked and you receive a call brief:

- What we know: interest, budget, timeline, size, score, their first message, their last reply
- The goal of the call and a 30-minute agenda
- Four to six questions to ask, tied to their situation
- How you can help, likely objections with an answer, risks

Your notes count.
Whatever you write in `notes` goes into the next call brief.

STEP 8 · REPORT AND ROUTINE

Ten minutes a day. Fifteen on Monday.

Every Monday at 8:00, one e-mail. Every figure is computed by code from the sheet. Claude only writes the headline, three priorities and the risks, and the report still goes out if it fails.

SECTION	WHAT YOU READ
This week	Three concrete actions, naming the leads
Numbers, last 7 days	New leads by tier, contacted, replies, meetings, won, lost, open pipeline value
Needs you	Drafts to approve, replies waiting, hot leads not contacted after 24 hours, deals with no update for 7 days, e-mails stuck on sending

Your daily routine

1. **New lead alert.** Read the draft, edit if needed, set Send. Hot leads first.
2. **Morning digest.** Approve or skip the follow-ups of the day in one pass.
3. **Reply alert.** Read the suggested answer, edit, set Send, or reply yourself.
4. **Call brief.** Read it five minutes before the call.
5. **After the call.** Move the stage, fill `deal_value` and `notes`.

The pipeline is only as good as the stage column.
Update it after every call. The report, the stale-deal alerts and the call briefs all read it.

TEST, THEN GO LIVE

Ten tests before the first real lead

Use invented leads and e-mail addresses you own. Never test on a real prospect.

#	TEST	EXPECTED RESULT
1	A complete lead with a company website	One row, score and tier filled, a draft, your alert
2	The same submission twice	`already_received`, no new row, no alert
3	Same e-mail, new message	No new row, an Activity line, a "wrote again" alert
4	A spam message	Stage Disqualified, no draft
5	Set approval to Send	One e-mail within 5 minutes, stage Contacted
6	Set next_follow_up_at to yesterday, run workflow 2	A follow-up draft and the digest
7	Reply "unsubscribe"	Stage Opted out; later drafts are blocked
8	Reply "Can we talk Thursday?"	Stage Replied, a suggested answer, your alert
9	Calendar event with the lead as guest	Stage Meeting booked, call brief received
10	Break the Anthropic key on purpose	Lead saved as review, an incident and an alert

Go-live checklist

- All ten tests pass and the test rows are deleted.
- Your form says how you use the data and links your privacy page.
- Auto mode is off for the first two weeks.
- Workflow 6, then 1 to 5 are switched to Active.
- Someone owns the alerts and the digest every working day.

RULES, COMPLIANCE AND TROUBLESHOOTING

Be fast.
Stay welcome.

- **Inbound first.** This pipeline answers people who contacted you. For cold outreach, check the rules of your country before adding contacts by hand.
- **One-click way out.** Every follow-up offers to unsubscribe, and an unsubscribe is final. Keep it that way.
- **Minimise data.** The model never sees e-mail addresses or phone numbers. Delete leads when your retention period ends.
- **Protect your domain.** Keep the send limits in Settings, send from a real mailbox, and set up SPF, DKIM and DMARC.
- **Check your local rules.** This playbook is not legal advice; adapt it with your adviser where needed.

Troubleshooting

SYMPTOM	FIX
Form gets 401 or 403	The header name or secret differs between the form and *Receive Lead*
Every lead is tier review	Check the Anthropic credential and `model`; read `ai_problems`
A row stays on `sending:`	Check your sent folder, then set `sent: <id>` or clear the cell to resend
Draft not sent, `blocked:`	Read `ai_problems`: the lead replied, opted out or the stage changed
Replies not detected	IMAP on the wrong mailbox, or the lead answered from another address
Columns not filled	A header is misspelled: compare with the sheet header files of the kit
No call brief	The lead is not a guest of the event, or the calendar is not the one in workflow 4

Reply first.
Keep the final say.

Want it set up and adapted to your sales process? Generative Z builds AI agents and n8n automations for businesses in Spain and Europe.

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