

Automated CRM Lead Recovery

Never miss a lead again. AI scans your CRM every morning, finds who slipped through, and writes personalized follow-ups before you wake up.

Built by [@brycenwood.ai](#) · October 2026

THE PROBLEM

Leads come in. Nobody follows up.

Every business loses money the same way: a lead fills out your form at 11 PM, your team is asleep, and by morning it's buried under 30 other things. Studies show that responding within 5 minutes makes you **21x more likely** to close the deal. Most businesses respond in 24-48 hours. Some never respond at all.

This system connects Claude Code directly to your CRM. Every morning, it scans for new leads that came in overnight, checks if anyone followed up, and drafts personalized emails based on each lead's industry. You wake up, review the drafts, and hit send. Zero leads slip through.

STEP 1

Connect Claude Code to your CRM

This works with GoHighLevel (GHL), but the same concept applies to any CRM with an API (HubSpot, Salesforce, etc). You need your API key and your location/account ID.

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I want to connect you to my GoHighLevel CRM so you can read my contacts and pipeline.

Here's my setup:

- API key: [YOUR GHL API KEY - find this in Settings > Business Profile > API Key]
- Location ID: [YOUR LOCATION ID - find this in Settings > Business Profile]

Create a config file at `_config/ghl.json` that stores these credentials.

Then test the connection by pulling my 5 most recent contacts and showing me their names and when they were added.

WHERE TO FIND YOUR GHL API KEY

In GHL, go to Settings > Business Profile > scroll to "API Key." Copy the full key (starts with "pit-"). Your Location ID is on the same page. If you're using HubSpot or another CRM, ask Claude Code to help you find your API credentials.

STEP 2

Build the lead scanner

This script checks your CRM for any new contacts that came in since the last scan and checks whether anyone on your team responded. It flags the ones that fell through the cracks.

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Build me a Python script called `lead_scanner.py` that:

1. Connects to my GHL CRM using the config in `_config/ghl.json`
2. Pulls all contacts added in the last 24 hours
3. For each contact, checks if there are any outbound messages (email, SMS, or call)
4. Outputs a table showing:
 - Contact name
 - Email and phone
 - When they came in
 - Source (form, Google, Instagram, etc)
 - Whether we responded (yes/no)

5. Highlights any contact with NO outbound response

Save the results to `_data/leads/daily_scan.json` so we have a history.

STEP 3

Add personalized email drafting

This is where it gets powerful. For every lead that didn't get a response, Claude Code writes a personalized follow-up based on their industry, what they submitted, and your services.

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Now add a drafting step to `lead_scanner.py`. For every contact that has NO outbound response:

1. Look at their company name, email domain, and any form data they submitted
2. Determine their industry (roofing, HVAC, landscaping, restaurant, etc)
3. Draft a short, personalized follow-up email that:
 - References their industry specifically
 - Mentions a pain point relevant to their business
 - Keeps it under 100 words (they read on their phones)
 - Sounds human, not templated
 - Ends with a clear next step (reply, call, or book a time)
4. Save drafts to `_data/leads/email_drafts.json`
5. Show me all the drafts for review before anything gets sent

IMPORTANT: Never send anything automatically. Draft only. I review and approve every email before it goes out.

STEP 4

Set it up to run every morning automatically

Now you automate it with a cron job. This runs the scanner every morning at 7 AM so the drafts are waiting for you when you wake up.

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Set up a cron job (or macOS LaunchAgent) that runs `lead_scanner.py` every morning at 7:00 AM.

Requirements:

- Runs the full scan + draft pipeline
- Logs output to `_data/logs/lead_scanner.log`
- If there are new un-responded leads, save the drafts
- If there are zero new leads, log "No new leads overnight" and exit quietly
- Send me a summary notification (optional: via email, Slack, or just log it)

Show me how to verify it's running and how to check the logs.

MAC VS LINUX VS WINDOWS

On Mac, Claude Code will create a LaunchAgent (runs even when Terminal is closed). On Linux, it uses crontab. On Windows, it uses Task Scheduler. Just tell Claude Code what OS you're on and it'll set up the right one.

STEP 5

Review and send

Every morning, you do three things:

1. **Check the drafts** - open `_data/leads/email_drafts.json` or ask Claude Code to show you
2. **Edit anything that needs tweaking** - change a line, add a detail, adjust the tone
3. **Send the approved ones** - either through your CRM or ask Claude Code to send via your email

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Show me this morning's lead scan results and email drafts. For each draft, show me the lead's info and the proposed email side by side so I can review them quickly.

Total time: 5 minutes. Every lead gets a personalized response within hours of submitting. That alone puts you ahead of 90% of your competitors.

REAL RESULT

I run this exact system for my vehicle wrap business. It scans GHL every morning, finds overnight leads, and drafts industry-specific emails. Before this, leads would sit for 2-3 days before anyone noticed. Now every lead gets a personalized response before 8 AM. The system paid for itself the first week.

That is the whole system.

Zero ad spend. Zero coding experience. The other playbooks
live at brycenwood.com/playbook, one download each.

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