

KOLVERA

MCP Prompt Guide for Claude AI

The complete workflow for driving Kolvera through Claude. Ten phases from business context to live campaign — every prompt, every tool, every benchmark, verified against the live MCP server.

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Works across all Kolvera verticals — recruitment, B2B sales, IT/MSP, HR consulting, and facilities management.

How to use this guide

Use this alongside Claude with the Kolvera MCP server connected. Not connected yet? See kolvera.io/guide/claude — one-click connector on claude.ai & Claude Desktop, or token auth for Claude Code, Cursor and Windsurf.

- Each phase explains **what it does**, gives **copy-paste prompts**, and names the **MCP tools** Claude will call.
- Work the phases **in order** — each builds on the output of the one before.
- Prompts in tinted boxes are templates. Replace the **[bracketed text]** with your own details.
- Credit costs are noted where they apply. You spend the same credits as the dashboard — MCP access itself is free on every plan.

BEST SETUP — ADD THIS TO YOUR CLAUDE PROJECT

Drop this PDF into your **Claude Project knowledge** (Projects → your project → Add to project knowledge). Claude then keeps the whole workflow and the tool cheat sheet (Appendix A) on hand in every chat — so you can just say "follow Phase 6 for ICP 3" and it knows the prompts, tools and stop rules without re-explaining.

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Business Context & ICP Creation

Every workflow starts with your **business context** and an **Ideal Client Profile**. Context drives AI email tone and ICP targeting; the ICP drives research, scraping and campaign messaging. Tight inputs mean better results with fewer credits.

Step 1.1 — Store your business context first

Claude saves this once and reuses it for every ICP, campaign and email. Populate *all* fields, not just "what you sell".

PROMPT — FROM A DESCRIPTION

Create a business context for my agency: we sell **[what you sell]**; our buyers are **[titles / company type]**; today they cope by **[current workaround]**; our pricing is **[fee structure]**; our edge is **[differentiators]**; voice should be **[tone]**. Set it as my primary context.

PROMPT — FROM YOUR WEBSITE (FASTER)

Build my business context from **[yourdomain.com.au]** and set it as primary.

MCP tools: `create_business_context` `create_business_context_from_website` `set_primary_business_context`

Step 1.2 — Generate the ICP

Let AI build the full profile from your context. This is the fast path — use the manual tool only when you want to hand-set every field.

PROMPT — AI-GENERATED (RECOMMENDED)

Generate an ICP titled **[name]** targeting **[industry or buyer type]**, using my primary business context. Then show me the full profile.

MCP tools: `generate_icp_profile` (AI, 2 cr) · `create_icp_profile` (manual, free) · `get_icp_profile`

THE ICP BRAIN FIELDS CLAUDE POPULATES

- `target_titles` — buyer job titles (Head of Sales, VP Operations, CTO)
- `target_industries` — specific verticals, not broad categories
- `target_company_sizes` — employee bands (11-50, 51-200, 201-500)
- `target_locations` — cities, states or countries
- `pain_points` · `outreach_hooks` · `objection_handling` · `disqualifiers`
- `differentiators` · `value_proposition`
- `linkedin_keyword` — a Boolean string for LinkedIn / Sales Nav

TIP

Create one ICP per campaign audience. Mixing verticals in a single ICP dilutes Deep Research results and campaign messaging. `generate_icp_profile` costs 2 credits; `create_icp_profile` (manual fields) is free.

ICP Review & Refinement

Review the ICP before spending credits on research. A few minutes tightening here saves hours of filtering later.

Step 2.1 – Review alignment

PROMPT

Pull ICP **[ID]** and review it. Are the target titles right for my buyer? Are the industries specific enough? Anything missing from the exclusion list? Are the pain points specific to my offer or too generic? Suggest improvements.

MCP tools: `get_icp_profile`

Step 2.2 – Tighten

- Narrow industries from 20+ down to 8-12 for better research convergence
- Add competitor names to disqualifiers
- Exclude companies you already target through other channels
- Refine company size (drop micro-companies if your product needs a team of 5+)
- Add or sharpen the LinkedIn keyword string

PROMPT

Update ICP **[ID]**: narrow industries to **[list]**, add **[companies]** to disqualifiers, change company size to **[range]**, and update the LinkedIn keyword to **[string]**.

MCP tools: `update_icp_profile`

Deep Research & Company Discovery

Deep Research discovers companies that match your ICP and that you did not know existed. The initial run costs **3 credits**; each expand costs **2 credits**. Goal: a pool of 50-100+ companies.

Step 3.1 — Run initial research

PROMPT

Run Deep Research against ICP **[ID]**. Wait for it to finish, then show me the results summary and company count.

MCP tools: `trigger_deep_research` `get_research_report`

TIP

The brief is auto-generated from the ICP — you don't need to write one. Set breadth with `precision: strict` (tighter, higher hit-rate), `balanced` (default), or `broad` (wider net, adjacent verticals). Research runs async — poll `get_research_report` after ~60s, using `fields: status` while waiting and `fields: full` once complete.

Step 3.2 — Expand until diminishing returns

PROMPT

Run expand searches against ICP **[ID]** until diminishing returns. Stop after 2 consecutive runs returning fewer than 2 new companies. Show me the expansion trend after each run.

MCP tools: `expand_deep_research` `get_research_report`

STOP RULES

- **Tight ICPs (5-8 industries):** stop at <2 new companies for 2 consecutive runs
- **Broad ICPs (15+ industries):** stop at 3+ consecutive runs at/below 4 new companies with no upward spike
- Set a credit budget first (e.g. 30-50 credits max for research)

TIP

Track the trend. Clear convergence: 9, 8, 5, 3, 1, 0. Broad-ICP oscillation: 9, 8, 5, 6, 3, 6, 8, 4, 3 — apply the practical stop rule.

Step 3.3 — Review results

PROMPT

Pull the full research report **[ID]**. Summarise companies by vertical, highlight highest-priority targets, and flag noise to exclude from future runs.

MCP tools: `get_research_report` `list_research_reports`

Job Board Scraping

Scrape SEEK, LinkedIn, Indeed and Reed for live job postings matching your ICP. Companies actively hiring are the highest-intent targets — whether you sell recruitment, software or services.

Step 4.1 — Create or reuse a scrape config

PROMPT

List my scrape configs. Is there one aligned to ICP **[ID]**? If not, create one from the ICP covering the relevant job titles and locations.

MCP tools: `list_scrape_configs` `get_scrape_config` `run_job_scrape`

TIP

Fastest path: `run_job_scrape` with an `icp_id` builds a full, UI-quality config (excludes, classification, sector) *and* starts the scrape in one call. Use `run_saved_config` when you already have a config you want to re-run.

Step 4.2 — Run the job boards

PROMPT

Run scrapes on SEEK, LinkedIn and Indeed using config **[ID]**. Wait for completion and show me the results.

MCP tools: `run_saved_config` `get_scrape_progress`

TIP

Valid source values are `seek`, `indeed`, `linkedin`, `reed` (Reed = UK). Run them as separate calls (effectively parallel). SEEK takes longest; LinkedIn finishes first. Poll every ~90s.

Step 4.3 — Quality gate analysis

PROMPT

Run quality gate analysis on config **[ID]**. Show pass rate, filter breakdown and repeat offenders, then add the suggested excludes to the config.

MCP tools: `analyze_scrape_quality` `update_search_config_excludes`

Scrape Review & Pipeline Filtering

Review scraped jobs for companies actively hiring roles that match your ICP.

Step 5.1 – Search the pipeline

PROMPT

Search the job pipeline for the most recent results sorted by date. Filter for companies hiring **[target role types]**, exclude non-ICP noise, and give me a prioritised list with role title, company, location and salary if listed.

MCP tools: `search_pipeline_jobs` `get_pipeline_job`

Step 5.2 – Cross-reference with the ICP

PROMPT

Which of these actively-hiring companies are already in ICP **[ID]**? Which are new and should be added? Flag any I'm already handling manually.

MCP tools: `search_companies` `link_company_to_icp` `list_icp_prospects`

Contact Enrichment

Turn your company list into a contact list you can campaign against by finding decision-makers and their verified details.

Step 6.1 — Batch find contacts

PROMPT

Find contacts at the top 20 companies in ICP **[ID]** with `batch_find_contacts`, linking them to the ICP. Start with companies that have 50+ employees for best coverage. Poll until done.

MCP tools: `batch_find_contacts` `find_company_contacts` `get_enrichment_job`

TIP

`batch_find_contacts` takes up to **20** company IDs and runs async — poll `get_enrichment_job(job_key)` every 15-30s. 2 cr per contact found with a verified email. Companies under 50 employees often return zero; for those, `create_contact` manually then `find_contact_email`.

WARNING

Large 20-company batches can take 8-12 minutes. If a job stalls, retry in batches of 10.

Step 6.2 — Fill missing emails

PROMPT

Run bulk email enrichment on every contact in ICP **[ID]** that doesn't have a valid email.

MCP tools: `bulk_find_emails` `find_contact_email` `verify_contact_email` `get_bulk_enrichment_status`

Step 6.3 — Phone enrichment (optional)

PROMPT

Find phone numbers for my top 20 highest-priority contacts.

MCP tools: `bulk_find_phones` `find_contact_phone` `get_bulk_enrichment_status`

TIP

Phone costs vary: 6 cr fresh direct dial, 2 cr company line, 0 cr for lines already on file or BYOK. Use selectively on high-value targets.

Prospect & Candidate Sorting

Contacts from the extension or batch enrichment arrive as a mix of buyers, candidates and noise. Sort before outreach.

Step 7.1 — Pull and sort new contacts

PROMPT

Pull the most recent **[number]** contacts by created date. Sort into PROSPECTS (decision-makers to sell to), CANDIDATES (people you could place, if applicable) and SKIP (irrelevant titles). Give me the breakdown with contact IDs.

MCP tools: `search_contacts`

Step 7.2 — Link candidates to MPC profiles

For recruitment users — link candidates to MPC (Most Placeable Candidate) pools:

PROMPT

Batch-link these candidates to the correct MPC profiles with `batch_link_candidates_to_mpc`: **[Role A]** candidates to MPC **[ID]**, **[Role B]** candidates to MPC **[ID]**.

MCP tools: `batch_link_candidates_to_mpc` `create_mpc_profile` `list_mpc_profiles`

TIP

`batch_link_candidates_to_mpc` takes a `links` list where each item is `{contact_id, mpc_id}` — candidates can span multiple pools in one call (max 200).

Step 7.3 — Add prospects to hot lists

PROMPT

Add these prospect contacts to hot list **[ID]** — they're decision-makers at target companies.

MCP tools: `add_to_hot_list` `create_hot_list`

CHROME EXTENSION HIT RATES

- Broad company-page scrapes: **6-17%** relevant-title hit rate
- Title-specific LinkedIn searches (e.g. "Head of Sales" at target companies): **60-70%**
- Always prefer title-specific searches for efficiency

Hot List Organisation

Hot lists group prospects for targeting. Organise by sub-niche so each campaign speaks to one audience with one message.

Step 8.1 — Create niche hot lists

PROMPT

Review all prospects in ICP **[ID]** and split them into hot lists by sub-niche — e.g. **[Vertical A]** leaders, **[Vertical B]** leaders, **[Vertical C]** leaders. Each list should be tight enough for a single campaign message.

MCP tools: `create_hot_list` `add_to_hot_list` `list_hot_lists` `build_target_hotlist`

Step 8.2 — Tier your prospects

- **S-tier** — active hiring signal + strong ICP fit + valid email. Outreach immediately.
- **A-tier** — strong fit + valid email, no hiring signal. Outreach this week.
- **B-tier** — ICP fit but missing email or weaker signal. Enrich first, then queue.

PROMPT

Review hot list **[ID]** and assign tiers: S for contacts at companies actively hiring with valid emails, A for strong fit with emails, B for the rest.

MCP tools: `update_hot_list_member` `get_hot_list`

TIP

The `tier` field accepts `s`, `a` or `b` only (lowercase) — not `"tier_1"` or `"TIER 1"`. Claude maps S/A/B to these automatically.

Campaign Creation & Outreach

Build multi-step email campaigns. Each targets one hot list with a clear audience, a clear hook, and 3-5 steps.

Step 9.1 — Draft the strategy

PROMPT

Draft a 4-step email campaign for **[hot list name]**. Offer: **[description]**. Pain point: **[problem]**. Step 1 cold open (pain + credibility), Step 2 value nudge (+3 days), Step 3 social proof / case study (+5 days), Step 4 breakup (+7 days). Each email under 100 words, direct tone, not salesy.

Step 9.2 — Create in Kolvera

PROMPT

Create a draft campaign called **[name]**, linked to ICP **[ID]**, daily limit **[number]**. Then generate the email steps, using these per-step angles as hints: **[step 1 angle]**; **[step 2 angle]**; **[step 3 angle]**; **[step 4 angle]**.

MCP tools: `create_campaign` `generate_campaign_steps` `get_campaign_generation_status`

TIP

`daily_limit` is set on `create_campaign` (default 30). `generate_campaign_steps` reads your linked ICP and business context *directly* — don't paste the full ICP back in. Steer the sequence with `step_hints` (one angle per step). Set `variant_mode` to `ab` or `abc` on create to get distinct A/B/C variants. Generation is async — poll `get_campaign_generation_status`.

Step 9.3 — Review copy

PROMPT

Pull campaign **[ID]** and show all steps. Review each for tone, length (under 100 words), personalisation and CTA clarity. Suggest improvements.

MCP tools: `get_campaign` `update_campaign_step`

Step 9.4 — Assign inbox & enrol

PROMPT

List available inboxes and assign one to campaign **[ID]**. Enrol all contacts from hot list **[ID]** and show the enrolment count before activating.

MCP tools: `list_inboxes` `assign_inbox_to_campaign` `enrol_contacts_in_campaign`
`get_campaign_enrollments`

Step 9.5 — Activate & monitor

PROMPT

Activate campaign **[ID]**. After 24 hours, pull stats: sent, opened, replied, bounced.

MCP tools: activate_campaign get_campaign_stats pause_campaign resume_campaign

LinkedIn Chrome Extension Workflows

The Kolvera Chrome extension scrapes LinkedIn profiles straight into your CRM. Pair it with Sales Navigator for high-volume sourcing.

Step 10.1 — Set up the search

Use the Sales Navigator **Current Company** filter (up to 50 companies) with a **Title** filter using OR operators.

PROMPT

Give me companies from ICP **[ID]** in batches of 10 for a Sales Nav search, plus 6 target titles to use in the Title filter with OR operators.

Example title string: Head of Sales OR Sales Director OR VP Sales OR Head of Growth OR Head of Customer Success OR Head of Business Development

Step 10.2 — Scrape & sort

PROMPT

I just scraped **[number]** contacts via the Chrome extension. Pull the newest contacts, scan for relevant titles, sort into prospects and candidates (if applicable), and link or add them to the right profiles and hot lists.

MCP tools: `search_contacts` `batch_link_candidates_to_mpc` `add_to_hot_list`

SAFE LINKEDIN LIMITS

- 80-100 profile views per day
- 100-150 Chrome extension scrapes per day
- 20-25 connection requests per day (LinkedIn-enforced)
- 500-700 connection requests per week (rolling cap)

Full Tool Reference

BUSINESS CONTEXT

`create_business_context` — Create a context (all 7 fields drive AI emails + ICP)

`create_business_context_from_website` — Import & auto-fill from a URL

`list_business_contexts` · `update_business_context` · `set_primary_business_context` · `delete_business_context`

ICP MANAGEMENT

`generate_icp_profile` — AI-generate a full ICP from context (2 cr)

`create_icp_profile` — Create manually with explicit fields (free)

`get_icp_profile` · `update_icp_profile` · `list_icp_profiles` · `list_icp_prospects`

`link_company_to_icp` · `link_prospect_to_icp` · `archive_icp_profile` · `delete_icp_profile`

DEEP RESEARCH

`trigger_deep_research` — Start discovery (3 cr); `precision`: strict / balanced / broad

`expand_deep_research` — Find more companies (2 cr per expand)

`get_research_report` · `list_research_reports` · `research_company`

JOB SCRAPING

`run_job_scrape` — One-shot: build config from an ICP + scrape. `source`: seek / indeed / linkedin / reed

`run_saved_config` — Run an existing config. Same `source` values

`list_scrape_configs` · `get_scrape_config` · `update_scrape_config` · `archive_scrape_config`

`get_scrape_progress` · `analyze_scrape_quality` · `update_search_config_excludes` · `search_pipeline_jobs` · `get_pipeline_job`

CONTACT ENRICHMENT

`find_company_contacts` — One company (async) · `batch_find_contacts` — up to 20 companies (async)

`find_contact_email` · `bulk_find_emails` · `verify_contact_email` · `find_contact_phone` · `bulk_find_phones`

`find_company_candidates` · `batch_find_candidates` — candidate sourcing (reverse marketing)

`get_enrichment_job` · `get_bulk_enrichment_status` — poll async jobs

CONTACTS & COMPANIES

`search_contacts` · `get_contact` · `create_contact` · `update_contact` · `delete_contact`

`search_companies` · `get_company` · `create_company` · `update_company` · `get_company_contacts` · `delete_company`

MPC PROFILES (CANDIDATE POOLS)

`generate_mpc_profile` · `create_mpc_profile` · `get_mpc_profile` · `list_mpc_profiles` · `list_profile_suggestions`

`link_candidate_to_mpc` · `batch_link_candidates_to_mpc` (`links`: [{`contact_id`, `mpc_id`}], max 200) ·

`unlink_candidate_from_mpc`

HOT LISTS

`create_hot_list` · `list_hot_lists` · `get_hot_list` · `build_target_hotlist`

`add_to_hot_list` (`tier` = s / a / b; skips duplicates) · `update_hot_list_member` · `remove_from_hot_list` · `delete_hot_list`

CAMPAIGNS

create_campaign (daily_limit, variant_mode none/ab/abc, link icp_id) · create_campaign_step

generate_campaign_steps (async; uses step_hints) · get_campaign_generation_status · get_campaign · list_campaigns

update_campaign · update_campaign_step · enrol_contacts_in_campaign · unenrol_from_campaign · get_campaign_enrollments

assign_inbox_to_campaign · list_inboxes · activate_campaign · pause_campaign · resume_campaign · get_campaign_stats · duplicate_campaign · delete_campaign

MEETINGS, CREDITS & FATHOM

create_meeting · update_meeting · delete_meeting · list_meetings · get_meeting

get_credit_balance · get_credit_history · sync_fathom_meetings · list_fathom_notes

Polling & Timing Guide

Most Kolvera operations are asynchronous: Claude dispatches the job and polls for completion.

Recommended timings:

OPERATION	WHEN TO POLL
<code>trigger_deep_research</code>	After ~60s, then every 30s
<code>expand_deep_research</code>	After ~60s
<code>run_saved_config – seek</code>	5-10 min full sweep; poll every 90s
<code>run_saved_config – linkedin</code>	Usually 2-4 min
<code>run_saved_config – indeed</code>	Usually 3-5 min
<code>batch_find_contacts (20 cos)</code>	8-12 min; poll <code>get_enrichment_job</code> every 15-30s
<code>bulk_find_emails</code>	1-2 min; poll <code>get_bulk_enrichment_status</code> after 60s
<code>generate_campaign_steps</code>	Poll <code>get_campaign_generation_status</code> after 30s
<code>run_job_scrape</code>	Poll <code>get_scrape_progress</code> every 30s

TIP

When polling research or expands, request `fields: status` to save tokens. Switch to `fields: full` only once status shows complete.

Known Issues & Workarounds

Production-tested edge cases and how to route around them.

- **add_to_hot_list** can reject a whole batch if one ID is invalid. *Workaround:* verify IDs first, or add in smaller batches.
- **find_company_contacts with icp_id** may error if the website scraper returns zero results. *Workaround:* omit `icp_id`, then link prospects afterwards.
- **update_scrape_config** can time out when updating multiple fields. *Workaround:* one field per call.
- **Chrome extension** can create duplicate company entities. *Workaround:* `search_companies` before creating.
- **ICP prospect count** may differ between UI and API. *Workaround:* pull the ICP directly to verify.
- **Deep Research report delta** \neq ICP database growth. *Workaround:* check ICP company count before and after each expand.
- **Broad ICPs (15+ industries)** may never hit the <2 convergence threshold. Use the practical stop rule (Phase 3).
- **batch_find_contacts** can stall on 20-company batches. *Workaround:* retry in batches of 10.
- **MCP server unresponsive** (repeated timeouts on every call)? Reconnect: run `/mcp` in Claude Code, or restart Claude Desktop.