RVO

FREE GUIDE / AI FOR BUSINESS

Claude as your customer service rep

The exact setup used at WeJapa to reply leads on WhatsApp and Instagram, follow up the quiet ones and track every lead. Every prompt included.



4 steps
to set it up

30 min
of your time

Every prompt
ready to copy

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START HERE

Four steps, about 30 minutes

Set up Claude to reply your customers on WhatsApp and Instagram, follow up the quiet ones and track every lead. Copy the prompts in this guide and swap in your own business details.

01 **Connect**
Your inboxes

02 **Facts**
Your cheat sheet

03 **Rules**
What it can send

04 **Tracker**
Every lead

What you need

A paid Claude plan
Claude in Chrome comes with the paid plans.

Google Chrome on a computer
With the Claude in Chrome extension installed.

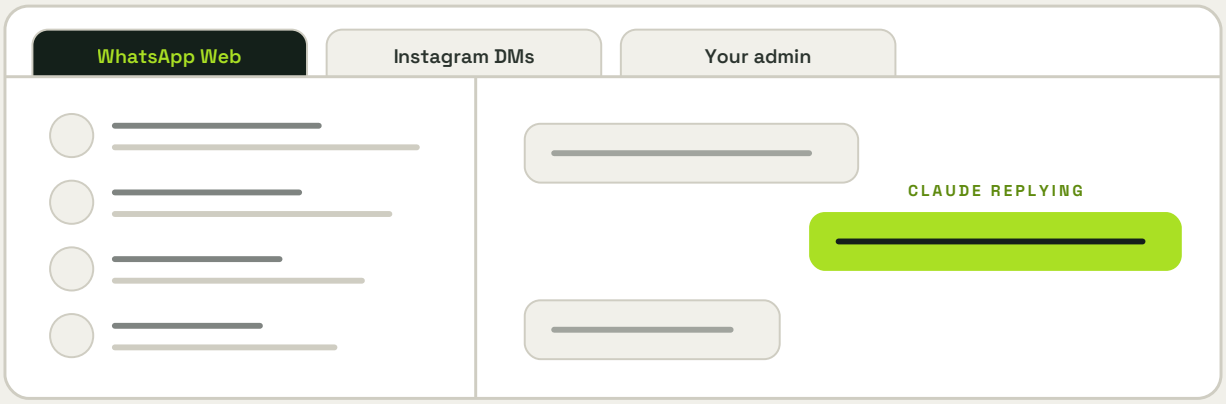
Your inboxes, logged in
WhatsApp Web and Instagram, in that same Chrome.

About 30 minutes
To fill in your business details.

STEP 01

01 Connect Claude to your inboxes

Claude in Chrome lets Claude use your browser, so it sees exactly what you see and works in the same tabs you do.



01 Install the extension
Add Claude in Chrome from the Chrome Web Store and sign in with your Claude account.

02 Open WhatsApp Web
Go to web.whatsapp.com in that Chrome and scan the QR code with your phone.

03 Open your other inboxes
Instagram DMs at instagram.com/direct, plus anywhere else customers message you.

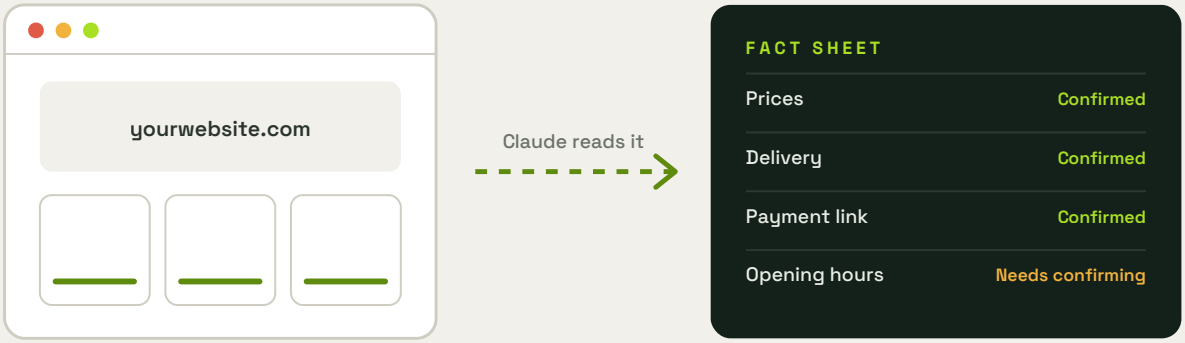
04 Leave the tabs open
Claude works in them while you get on with other things.

IMPORTANT
Never give Claude your passwords or login codes. You log in yourself, once.

STEP 02

02 Build your cheat sheet

This is the one place Claude checks before it answers anyone. If a fact isn't on it, Claude asks you instead of guessing. Pick one of two ways to build it.



Option A: let Claude read your website

Best if your prices and details are already on your site.

PROMPT / OPTION A

Go to [your website URL] and read every page, including products, pricing, FAQs, delivery, contact and terms.

Create a spreadsheet called "[Business name] Customer Service" with a tab called Fact Sheet. Columns: Topic, Answer, Status, Source.

Fill it with what you find: what we sell, every price, how long delivery or processing takes, what customers need to provide, how to order or pay (with the exact links), opening hours, and the questions customers are likely to ask with the answers from the site. Put the page link in the Source column for each row.

Mark anything you're not sure about, or that the site doesn't say, as "Needs confirming" and list those for me at the end so I can fill them in.

Add a row called Reply style: [how you talk, e.g. short and friendly, no emojis, answer only what was asked, always end with the link to order].

When I tell you a fact has changed, update the sheet first, then use the new fact everywhere.

TIP

Check the rows marked Needs confirming before you go live. Websites go out of date, and Claude will quote whatever the sheet says.

STEP 02 CONTINUED

Option B: fill it in yourself

Best if your details aren't online, or your website is out of date.

PROMPT / OPTION B

Create a spreadsheet called "[Business name] Customer Service" with a tab called Fact Sheet. Columns: Topic, Answer, Status, Source.

Add these facts:
- What we sell: [products or services]
- Prices: [each product and its price]
- How long delivery or processing takes: [timelines]
- What customers need to provide: [documents, details, measurements]
- How to order or pay: [link to your website, payment page or form]
- Opening hours and when we reply: [hours]
- Questions customers ask most, with my answers: [list them]

Add a row called Reply style: [how you talk, e.g. short and friendly, no emojis, answer only what was asked, always end with the link to order].

When I tell you a fact has changed, update the sheet first, then use the new fact everywhere.

TIP

The Reply style row matters most. Skip it and Claude will reply your customers like a bank.

RVO MEDIA / WEBSITES

No website, or one that’s out of date?

Customers check your site before they message you, and Claude can only read what's on it. We build business websites and online stores that hold every price, product and answer in one place, so your customers and Claude both get it right.

Book a call / WhatsApp +234 916 059 1000

STEP 03

03 Set the rules for what it can send

This is where most people go wrong. Let Claude send everything and one wrong price goes to a real customer. Make it check everything and you've saved no time. Split it like this.

Sends on its own
Follow ups, thank yous, links

Waits for your send
Quotes, first replies, money

CLAUDE SENDS ON ITS OWN	CLAUDE DRAFTS, YOU APPROVE
Follow ups to people who went quiet	First reply to a new customer
Short thank yous and acknowledgements	Price quotes and discounts
Your order or payment link when they're ready	Anything not on the cheat sheet
Your saved first reply templates	Complaints and refunds

PROMPT

You are my customer service assistant for [Business name]. You work in my WhatsApp Web and Instagram tabs in Chrome.

Before replying anyone, read the Fact Sheet. Only use facts from it. If a customer asks something it doesn't cover, don't guess: tell me and wait.

You can send these without asking me:
- Follow ups to customers who haven't replied in [6] hours
- Short acknowledgements
- Our order link when a customer says they're ready
- My saved first reply templates

Show me a draft and wait for me to say "send" for:
- First replies to new customers
- Price quotes, discounts and anything about money
- Complaints and refunds

When you show me drafts, write out the full text of every one so I can approve them in one go. Follow the Reply style row on every message.

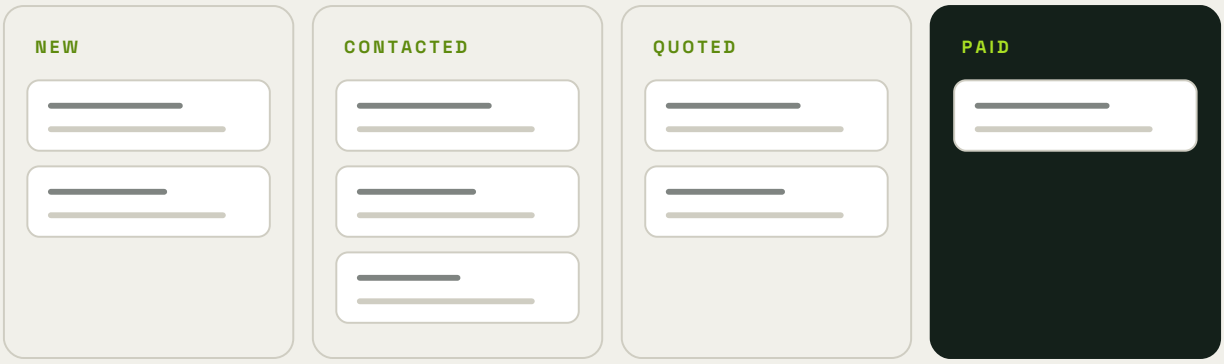
TIP

If you run ads, give Claude the exact first reply for each ad and tell it to send that as written.

STEP 04

04 Give it a lead tracker

The tracker is what stops leads falling through the cracks. Every person who messages you gets a row, and Claude always knows who to chase next.



PROMPT

Add a second tab to my Customer Service sheet called Lead Tracker. Columns: Name, Channel (WhatsApp or Instagram), Phone or handle, What they want, Stage, Next step, Last message from us, Last message from them, Notes.

Stage options: New, Contacted, Engaged, Quoted, Paid, Closed (no).

Go through my WhatsApp and Instagram chats from the last [7] days and add every customer conversation. After every message you send or read, update that person's row.

TIP

Run it on a schedule. Ask Claude to set up a scheduled task that checks your inboxes every hour during work hours. It only runs while your computer is on and Chrome is open, so leave both running.

EVERY DAY

The prompts I actually use

Once it's set up, these four cover most days.

Check for new messages

PROMPT

Check WhatsApp and Instagram for new customer messages. Reply what you're allowed to, update the Lead Tracker, and show me drafts for the rest.

Change a price everywhere

PROMPT

Our [product] price is now [new price]. Update the Fact Sheet, then send everyone in the Lead Tracker who asked about [product] a short message with the new price.

Chase quiet leads

PROMPT

Find everyone in the Lead Tracker we haven't heard from in [2] days and send them a short check in.

Teach it your voice

PROMPT

Read how I replied to [customer] just now and add what you learn to the Reply style row.

WANT THIS SET UP FOR YOU?

Let RVO Media do it with you

This guide covers customer service. Most businesses have three or four more places where AI can save hours every week, and don't know where to start. That's what we do.

AI business audit

We go through how your business runs and show you where AI saves time and money.

Workflow setup

Claude set up for customer service, sales follow ups, bookings or admin, trained on your business.

AI content

Ads, videos and social content made with AI, in your brand.

Custom platforms

Websites, online stores, apps and booking systems built around how your business works.

We've been building for businesses since 2012, and online stores we've built have crossed $3 million in sales.

BOOK A FREE CALL

Tell us about your business

A short call to see where AI fits in your business and what we would build first.

calendly.com/otoide

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