



## AI Marketing Labs

— FREE LIVE WORKSHOP · SETUP GUIDE

# Build your AI *reporting agent.*

Everything to set up before the session, so we can spend the full hour building your agent with you.

October 21, 2026 · Noon ET

60 minutes

Live on Zoom

Led by Rick Kranz

Co-Founder and CEO, AI Marketing Labs

[ai-marketinglabs.com/the-lab](https://ai-marketinglabs.com/the-lab)

Where members build systems like this together

## — BEFORE YOU JOIN

# Finish this before *October 21*.

We spend the full hour building and testing your reporting agent, so there is no time in the session to set up accounts or connect data.

Don't leave this for the morning of the workshop. Some steps, like a new trial account or an admin approving a connection, can take a day.

### STEP 1

#### Get a paid Claude plan

Pro is enough.

### STEP 2

#### Connect your data

Databox, HubSpot, or a Google Sheet. Pick one.

### STEP 3

#### Gather your materials

An example update and a few lines of context.

Each step ends with a quick test so you know it worked. The checklist at the end lets you confirm you're ready.

**New to AI Marketing Labs?** This workshop is one of the systems members build together in The Lab. [See The Lab →](#)

## — STEP 1

# Get a paid *Claude plan*.

You need a paid Claude plan. **Pro is enough**. Connecting outside data (Databox, HubSpot, Google Drive) needs a paid plan, so the free plan won't work.

1. Go to [claude.ai](https://claude.ai) and sign in, or create an account.
2. If you're on the free plan, upgrade to Pro from your account settings.
3. Optional: install the [Claude desktop app](#). Everything in this guide also works in your web browser.

**On a company Team or Enterprise plan?** Your workspace owner or admin has to turn on each connector before you can use it. Ask them now, and send them the name of the connector you'll use in Step 2.

## — QUICK TEST

Open a new chat and look for the + button next to the message box. Click it and you should see a **Connectors** option. If you do, you're ready for Step 2.

## — STEP 2

# Choose your *data source*.

Pick **one** way to get your performance data into Claude. If you're not sure, use Databox: it's the source Rick builds with in the workshop, and you can start a free trial.

| OPTION                                  | BEST IF                                                                           | WHAT YOU NEED                                                                          |
|-----------------------------------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <b>A. Databox</b><br><b>RECOMMENDED</b> | You track marketing or sales numbers across tools (GA4, ads, HubSpot, and others) | A Databox account (free trial, no credit card) with at least one data source connected |
| <b>B. HubSpot CRM</b>                   | Your key numbers live in HubSpot (contacts, deals, pipeline, campaigns)           | A HubSpot user account, and approval from your HubSpot Super Admin if you aren't one   |
| <b>C. Google Sheet</b>                  | You track numbers in a spreadsheet, or don't use Databox or HubSpot               | A Google account and a sheet with at least two periods of numbers                      |

In the last part of the workshop, Rick switches the same agent from Databox to a Google Sheet. If you want to try that with a second business, set up a Google Sheet too (Option C).

## — OPTION A · RECOMMENDED

# Connect *Databox*.

Databox pulls your numbers from the tools you already use into one place, and Claude reads them through the Databox connector.

### 01 Start a free Databox trial

Skip this if you already have Databox.

1. Go to [databox.com/signup](https://databox.com/signup) and sign up with your email. Your trial starts as soon as the account is created. You don't need a credit card ([Databox: Start a trial](#)).
2. Note when the trial ends (a banner in Databox counts down the days). Make sure it runs past October 21.

### 02 Connect at least one data source in Databox

1. In Databox, open **Data Manager**, then **Available integrations** ([Databox: Add a data source](#)).
2. Click the tile for a tool that holds the numbers you report on, such as Google Analytics 4, HubSpot, Google Ads, or a Google Sheet.

3. Sign in to that tool and approve access when asked.
4. Repeat for any other tools you want in your update. One or two sources is plenty for the workshop.

Connect your sources a day or two early so Databox has time to pull in recent history.

### 03 Add the Databox connector in Claude

1. In Claude, open **Customize**, then **Connectors**. (Some versions show this under **Settings > Connectors**.)
2. Click **Add** (or +), choose **Custom**, then **Web**.
3. Enter these details (**Databox MCP setup**):

|      |                                                                       |
|------|-----------------------------------------------------------------------|
| Name | Databox                                                               |
| URL  | <a href="https://mcp.databox.com/mcp">https://mcp.databox.com/mcp</a> |

4. Click **Add**. A browser window opens. Log in to Databox and approve the connection.
5. Back in Claude, Databox now shows in your connectors list.

On a Claude Team or Enterprise plan, an admin has to add the Databox connector for your workspace first.

#### — TEST IT

Open a new chat, click +, hover over **Connectors**, and make sure **Databox** is switched on. Then ask:

Using my Databox data, list the data sources and metrics you can see, then tell me what changed most in the last 30 days.

If Claude answers with your real numbers, you're done. Skip to Step 3.

## Connect *HubSpot CRM*.

The HubSpot connector lets Claude read your contacts, companies, deals, pipelines, campaigns, and more. It works with every HubSpot plan, including free ([HubSpot: Set up the connector for Claude](#)).

### 01 Check your HubSpot permissions

- If you're a HubSpot **Super Admin**, or you have **App Marketplace Access**, you can connect right away.
- If not, ask your Super Admin to approve the HubSpot connector for Claude first. Do this early, since you'll be waiting on someone else.

### 02 Add the HubSpot connector in Claude

1. In Claude, open **Customize**, then **Connectors**. (Some versions show this under **Settings > Connectors**.)
2. Click **Browse**, find **HubSpot**, and click **Connect**. You can also go straight to [the HubSpot connector page](#).
3. Log in to the HubSpot account you want to report on. Claude can connect to one HubSpot account at a time.
4. Choose the permissions to allow, then click **Connect app**.

The connector can also create and update records. For this workshop you only need it to read. If your Super Admin offers it, set write actions to **Needs Approval** so Claude asks before changing anything.

### TEST IT

Open a new chat, click +, hover over **Connectors**, and make sure **HubSpot** is switched on. Then ask:

Using HubSpot, summarize new contacts, new deals, and deals closed in the last 30 days compared with the 30 days before. Which change stands out?

If Claude answers with your real numbers, you're done. Skip to Step 3.

## Connect a *Google Sheet*.

Claude reads Google Sheets through the Google Drive connector ([Claude: Google Workspace connectors](#)). This is also the option to use for a second business's numbers.

### 01 Set up your sheet

Keep it simple: one row per metric, one column per period, and at least two periods so the agent can see what changed. Use plain numbers (no charts or images; Claude reads text only).

| METRIC              | AUG 2026 | SEP 2026 |
|---------------------|----------|----------|
| Website sessions    | 12,400   | 13,900   |
| New leads           | 186      | 171      |
| Sales calls booked  | 32       | 41       |
| Deals closed        | 9        | 11       |
| Revenue closed (\$) | 48,500   | 61,200   |

These numbers are only an example. Use your own, and name the sheet clearly (for example, "Acme - Monthly Performance").

### 02 Connect Google Drive in Claude

1. In Claude, open **Customize**, then **Connectors**. (Some versions show this under **Settings > Connectors**.)
2. Click **Browse**, find **Google Drive**, and click **Connect**.
3. Sign in with the Google account that owns the sheet and allow access.

If Google shows "Access blocked: your institution's admin needs to review Claude for Google Drive", your Google Workspace admin has to mark the Claude app as trusted. Send them the article linked above, then wait about 15 minutes and try again.

### TEST IT

Open a new chat, click +, and choose **Add from Google Drive**. Search for your sheet, or paste its link. Then ask:

Read this sheet and tell me which metric changed the most between the last two periods, by how much, and in which direction.

If Claude answers with your real numbers, you're done.

## Gather your *materials*.

Have these saved in a document or note you can copy from during the workshop.

### 01 An example update you've written

Any recent performance update for your own business or one you work with: a weekly email to your team, a monthly client report, or a board summary. It shows the agent your format and your voice. Remove anything confidential you don't want to paste into Claude.

### 02 A few lines of business context

Answer these in one or two sentences each:

- What is the business working toward right now? (For example: grow qualified leads, raise average deal size.)
- What changed recently? (A new campaign, a price change, a new hire, a slow season.)
- Who reads the update, and what do they need to decide from it?

### 03 Optional: a second business's data

If you want to test your agent on another business in the final stage, set up a Google Sheet for it using Option C. Make sure it's connected and tested too.

#### AFTER THE WORKSHOP

## Keep building in *The Lab*.

The workshop gets one agent running. The Lab is where AI Marketing Labs members keep going: building systems like this one together in live sessions with Rick, using their own data and workflows.

Explore The Lab →

Free tools

## — FINAL CHECK

### Ready for *October 21?*

- ☐ I'm signed in to Claude on a paid plan (Pro or higher).
- ☐ My data source is connected: Databox, HubSpot, or a Google Sheet.
- ☐ My test prompt returned my real numbers.
- ☐ I have an example update saved and ready to paste.
- ☐ I've written my few lines of business context.
- ☐ Optional: a second business's Google Sheet is connected and tested.
- ☐ I've added the workshop to my calendar: October 21, 2026, noon ET, on Zoom.

## — TROUBLESHOOTING

### If something *isn't working*.

| PROBLEM                               | WHAT TO TRY                                                                                                                            |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| No <b>Connectors</b> option in Claude | Check that you're on a paid plan. On a Team or Enterprise plan, ask your admin to turn connectors on.                                  |
| Claude says it can't see Databox data | Make sure the connector is switched on in the chat (+ > <b>Connectors</b> ) and that at least one data source is connected in Databox. |
| HubSpot asks for approval             | Your HubSpot Super Admin needs to approve the Claude connector.                                                                        |
| Google shows "Access blocked"         | Your Google Workspace admin needs to mark Claude as a trusted app (see Option C).                                                      |
| The connector stopped working         | In <b>Customize &gt; Connectors</b> , disconnect it and connect again.                                                                 |

Still stuck? Reply to your registration email before October 21 and tell us which step you're on. If setup isn't finished by the 21st, still join: you can watch Rick build and finish yours afterward with the recording.