

AI Lead Intelligence & Sales Operations System

Zapier-based lead operations system for faster qualification, consistent follow-up, prioritized sales handoff, and CRM-ready data.

Business Objective
Turn incoming leads into an organized, intelligence-driven sales pipeline that automatically captures, qualifies, scores, routes, follows up, escalates, and synchronizes lead data - while keeping human sales teams focused on the opportunities that need them most.

The Business Problem

Growing teams often receive leads from forms and other channels but still rely on manual qualification, inconsistent prioritization, scattered follow-ups, and repetitive CRM entry. High-value prospects can wait too long for attention, warm leads may be forgotten, and sales teams spend time reviewing leads that are not ready to buy. Project 046 is designed to centralize this lifecycle and make every lead's next action explicit.

Common Pain Points	Desired Outcomes
- Manual lead review and data entry - Slow response to high-value opportunities - Inconsistent lead scoring and prioritization - Follow-ups dependent on memory - No clear recovery path for non-responsive leads - Duplicate or unsynchronized CRM records	- Every valid lead is captured and tracked - AI adds structured qualification intelligence - Hot leads reach sales immediately - Warm/cold leads enter controlled nurture paths - High-value no-response leads receive human recovery - CRM-ready records sync through API integration

Proposed Solution - 7 Modular Workflows

01 - Lead Intake	Captures form leads, normalizes data, validates required fields, checks for duplicates, generates a unique Lead ID, and creates or updates the central lead record.
02 - AI Qualification	Analyzes business need, intent, service fit, buying readiness, lead context, recommended action, and a concise AI sales summary.
03 - Scoring & Priority	Applies deterministic scoring logic to produce a Lead Score, Hot/Warm/Cold priority, scoring reason, and timestamp.
04 - Routing & Handoff	Routes leads by priority. Hot leads trigger Slack sales alerts; Warm leads enter follow-up; Cold leads enter nurture.
05 - Follow-Up & Nurture	Runs timed, personalized AI-assisted email follow-ups with status rechecks, tracking timestamps, and follow-up counters.
06 - No-Response Recovery	Rechecks unresolved leads after the nurture sequence, escalates valuable opportunities to a human, and moves lower-priority leads to long-term nurture.
07 - CRM Sync & API	Builds a structured JSON payload, sends lead data through an HTTP API/Webhook, and records CRM sync status, timestamp, and external reference ID.

Core Technology & Data

Stack: Zapier Tables, Google Forms, Formatter by Zapier, Filters, Paths, AI by Zapier, Code by Zapier, Delay by Zapier, Gmail, Slack, Webhooks/API integration. **Central record:** contact and company data, service interest, budget, timeline, AI qualification, business need, intent, fit, buying readiness, AI summary, recommended action, score, priority, routing state, follow-up state, and CRM sync state.

Client Value & Operational Impact

Faster Response Hot opportunities are identified and handed to sales without waiting for manual review.	Consistent Process Qualification, scoring, routing, and nurture follow defined business rules.	Better Focus Sales spends more time on high-value conversations and less on repetitive admin.
Reduced Lead Leakage Timed follow-ups and no-response recovery create a defined next action for unresolved leads.	Reusable Intelligence AI outputs and scoring reasons remain attached to the lead record for downstream use.	Integration Ready The API layer demonstrates portability to an external CRM or other business platform.

Implementation Note: This portfolio build uses a simulated business environment and a test API endpoint to demonstrate the architecture safely. In a client deployment, qualification criteria, scoring weights, follow-up timing, messaging, CRM schema, API authentication, error handling, consent/opt-out rules, and sales handoff policies would be configured around the client's real process.