



Demo Case Study: Lead Intake And Follow-Up Rescue System

Sample proof asset. This is an internal/demo example, not a client testimonial or guaranteed result claim.

The Situation

- A growing service business receives inquiries from a website form, phone calls, referrals, and direct email.
- Response speed varies because follow-up depends on memory and scattered notes.
- CRM stages do not clearly show which leads are new, active, waiting, won, or lost.

Demo Workflow

- Capture the inquiry in the CRM with lead source, offer interest, and lifecycle status.
- Create a same-day owner review task and visible follow-up date.
- Use AI to summarize likely pain, urgency, and next best action.
- Let the owner review the summary before any customer-facing message is sent.
- Route the lead to book an audit, answer a question, or wait for proposal follow-up.

Area	Before	After
Lead capture	Forms, email, referrals, and notes are scattered.	Leads move into one CRM path.
Follow-up	Owner relies on memory and manual reminders.	Every active lead has a next action.
Visibility	Pipeline does not clearly show what is stuck.	Pipeline shows new, active, waiting, won, and lost leads.
AI role	No consistent AI assist.	AI summarizes, drafts, and recommends next steps for review.
Reporting	Weekly status is hard to see.	Owner sees leads needing attention each week.

What A Client Would Receive

- Current workflow map and gap list.
- CRM fields, tags, stage, and follow-up recommendations.
- Owner-reviewed AI prompt flow for summaries and draft replies.
- Testing checklist, handoff notes, and next-step roadmap.

Metrics To Track

- Average time from inquiry to first response.
- Percentage of leads with a follow-up date.
- Percentage of qualified leads that book an audit.
- Number of stuck leads older than seven days.
- Number of leads with complete source and offer-interest fields.

Reusable lesson: The first useful AI system does not need to be big. A small, human-reviewed workflow that captures leads, creates tasks, summarizes context, and protects follow-up discipline can make the business easier to run before larger automation is added.