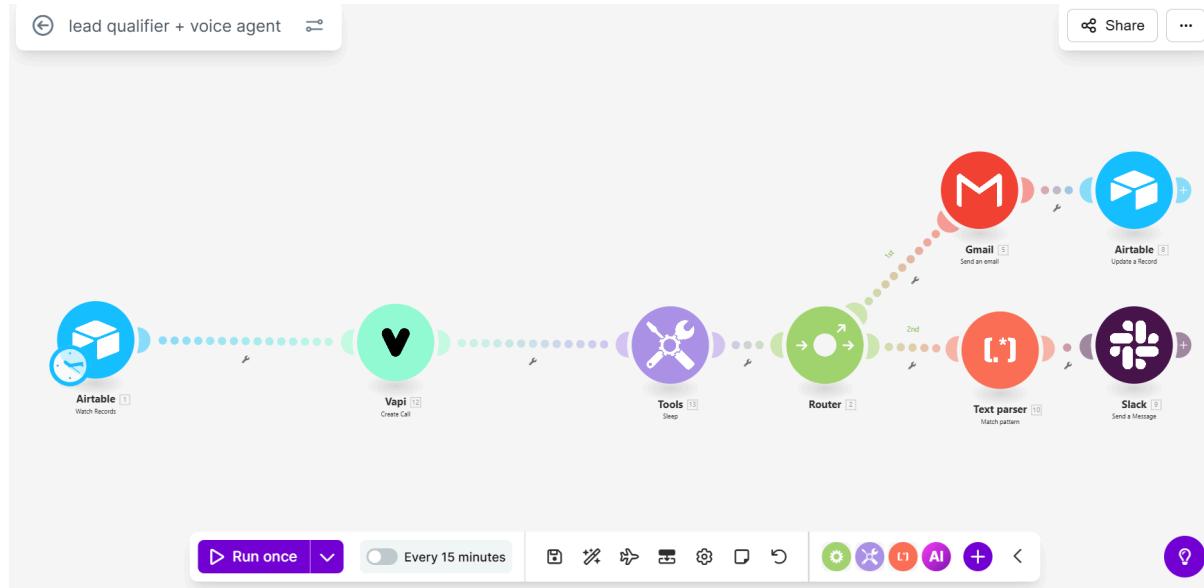


This project is an end to end AI automation that functions as a 24/7 "digital worker," designed to qualify inbound leads and initiate voice outreach without human intervention. By bridging the knowledge gap between manual sales tasks and AI efficiency, this system ensures that high-value prospects receive an immediate response, which can increase conversion success rates by 7 to 9 times.



The Problem vs. The AI Solution

- **The Manual Process:** Sales representatives must manually review form submissions, research companies, and make cold calls. This leads to human error, missed opportunities, and slow response times that can leave leads waiting for days.
- **The AI Solution:** This system acts as an intelligence layer that automatically analyzes a lead's budget, researches their company, and uses a conversational AI voice agent to pitch services and gauge interest within minutes of the initial contact.

The Technical Tech Stack

- **Workflow Builder:** **Make.com** (The Command Center).
- **Lead Intake:** **Tally** (Form builder).
- **Database:** **Airtable** (The "filing cabinet" with built-in AI for preliminary scoring).
- **Conversational AI:** **Vapi** (Outbound AI voice agent for deep qualification).
- **Intelligence Layer:** **OpenAI (GPT-4o mini)** (For web research and personalisation).
- **Communication:** **Gmail** and **Slack** (For automated follow-ups and team alerts).
- **Scheduling:** **Calendly** (Integrated via Gmail for booking discovery calls).

Workflow Architecture (The Six Pillars)

I structured this automation using the six core components of a professional AI workflow:

1. **Trigger:** A new submission in **Tally** is synced to **Airtable**, acting as the "factory start button".
2. **Filter:** **Airtable AI** evaluates the lead. Only prospects with a budget $\geq \text{£}10,000$ are marked "Qualified" to proceed.

how can we help

first name *

last name *

email

phone number *

phone number *

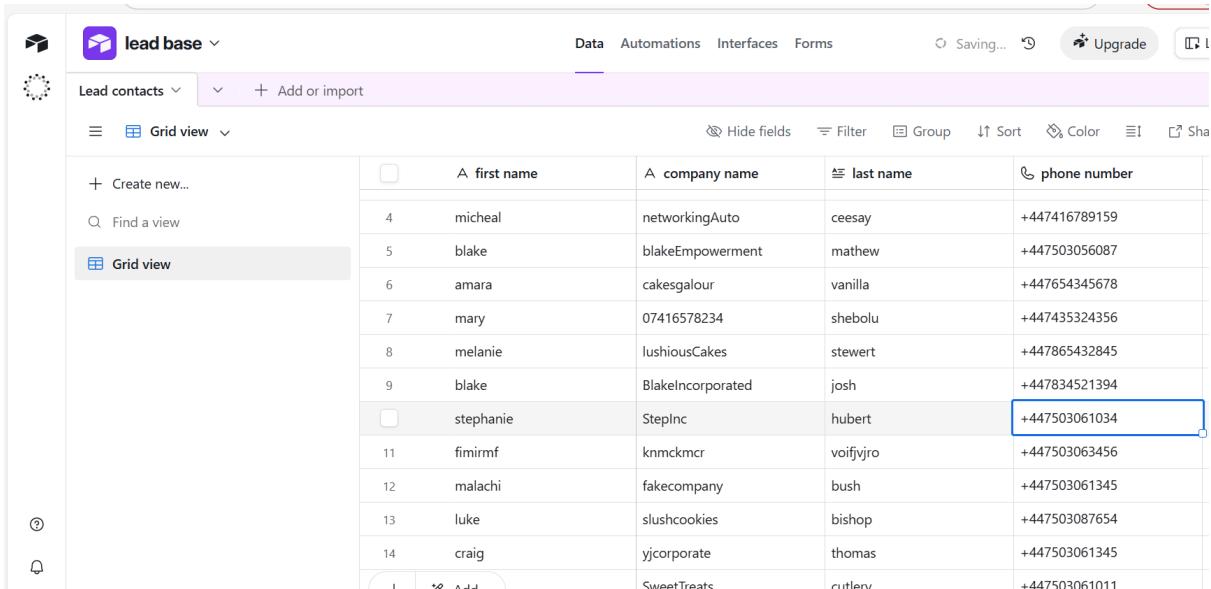
company name *

budget *

tell us about your needs *

submit →

 Made with Tally



The screenshot shows the Lead Base application interface. At the top, there's a navigation bar with icons for Data, Automations, Interfaces, Forms, and a saving status. Below the navigation is a search bar labeled "Lead contacts" with a dropdown arrow and a "Find a view" input field. A "Grid view" button is highlighted with a grey background. The main area displays a grid of 15 contact records. Each record includes a checkbox, first name, company name, last name, and phone number. The "phone number" column for the 14th contact is currently selected, indicated by a blue border around the cell containing "+447503061034".

	<input type="checkbox"/>	A first name	A company name	last name	phone number
+	<input type="checkbox"/>	micheal	networkingAuto	ceesay	+447416789159
Q	<input type="checkbox"/>	blake	blakeEmpowerment	mathew	+447503056087
	<input type="checkbox"/>	amara	cakesgalour	vanilla	+447654345678
	<input type="checkbox"/>	mary	07416578234	shebolu	+447435324356
	<input type="checkbox"/>	melanie	lushiousCakes	stewart	+447865432845
	<input type="checkbox"/>	blake	BlakelIncorporated	josh	+447834521394
	<input type="checkbox"/>	stephanie	StepInc	hubert	+447503061034
	<input type="checkbox"/>	fimirmf	knmckmcr	voifijviro	+447503063456
	<input type="checkbox"/>	malachi	fakecompany	bush	+447503061345
	<input type="checkbox"/>	luke	slushcookies	bishop	+447503087654
	<input type="checkbox"/>	craig	yjcorporate	thomas	+447503061345
	<input type="checkbox"/>		SweetTreats	cutlerv	+447503061011

✉ email	₱ budget	⌚ notes	📅 created on
michealceesay@gmail.com	£12,000.00	we are a fitness coaching c...	1/6/2026 7:28pm
blakemathew@hotmail.com	£9,000.00	I want to partner with recru...	1/6/2026 7:33pm
amaravanilla@yahoo.co.uk	£13,000.00	i want to expand my marke...	1/7/2026 10:55pm
maryshebolu@gmail.com	£15,000.00	I want to improve my mark...	1/8/2026 2:36pm
melaniestewart@gmail.com	£20,000.00	I would like to expand my r...	1/8/2026 2:39pm
blakejosh@gmail.com	£30,000.00	I want to generate multiple...	1/8/2026 2:43pm
stephaniehubert@gmail.com	£30,000.00	testing out ai automation	1/8/2026 3:34pm
iureujfbyrt@gmail.com	£45,000.00	to generate as much moine...	1/8/2026 3:46pm
malachibush@gmail.com	£25,000.00	I want to make this busines...	1/8/2026 3:53pm
jfnuefubfybf@gmail.com	£35,000.00	i need to make this ai softw...	1/8/2026 4:03pm
craigthomas@gmail.com	£70,000.00	trying to start an ai busines...	1/8/2026 4:08pm
jakecutlery@gmail.com	£25,000.00	hello, I want to improve my...	1/8/2026 5:20pm

📅 created on	⭐ Qualification	✉ message	📅 contacted on
1/6/2026 7:28pm	Qualified	Micheal Ceesay from...	
1/6/2026 7:33pm	Not Qualified	Blake Mathew from...	
1/7/2026 10:55pm	Qualified	Amara Vanilla from...	
1/8/2026 2:36pm	Qualified	Mary Shebolu is interested,...	
1/8/2026 2:39pm	Qualified	Melanie Stewart from...	
1/8/2026 2:43pm	Qualified	Blake Josh from...	
1/8/2026 3:34pm	Qualified	Stephanie Hubert from...	1/8/2026
1/8/2026 3:46pm	Qualified	Fimirmf Voifvjro from...	1/8/2026
1/8/2026 3:53pm	Qualified	Malachi Bush from...	1/8/2026
1/8/2026 4:03pm	Qualified	Luke Bishop from...	1/8/2026
1/8/2026 4:08pm	Qualified	Craig Thomas from...	1/8/2026
1/8/2026 5:20pm	Qualified	Drake Cutlery from...	

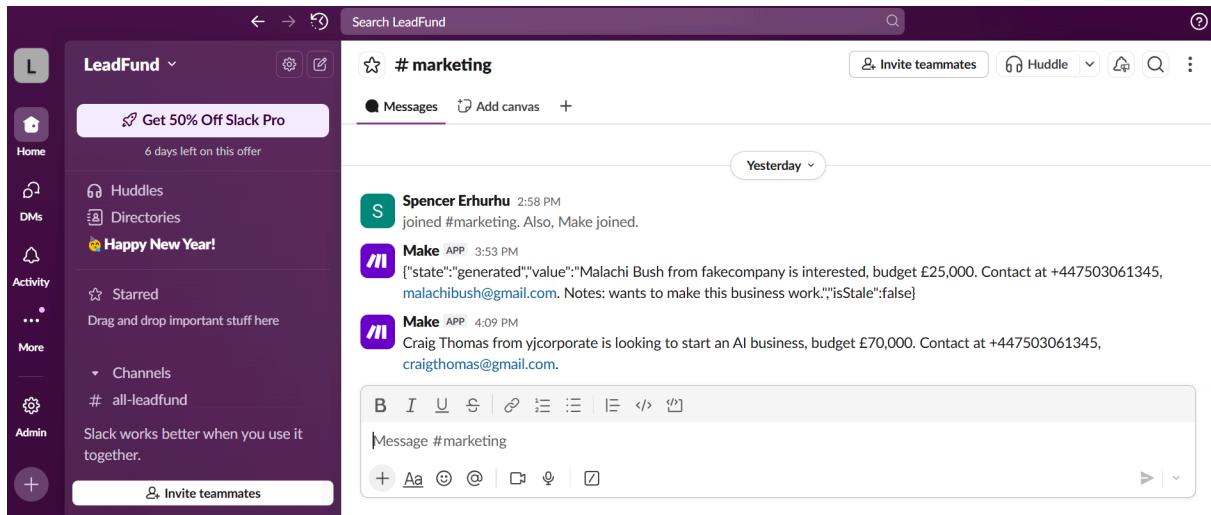
3. The Filter: A filter in Make.com ensures only records marked "Qualified" by the AI proceed to the outreach phase.

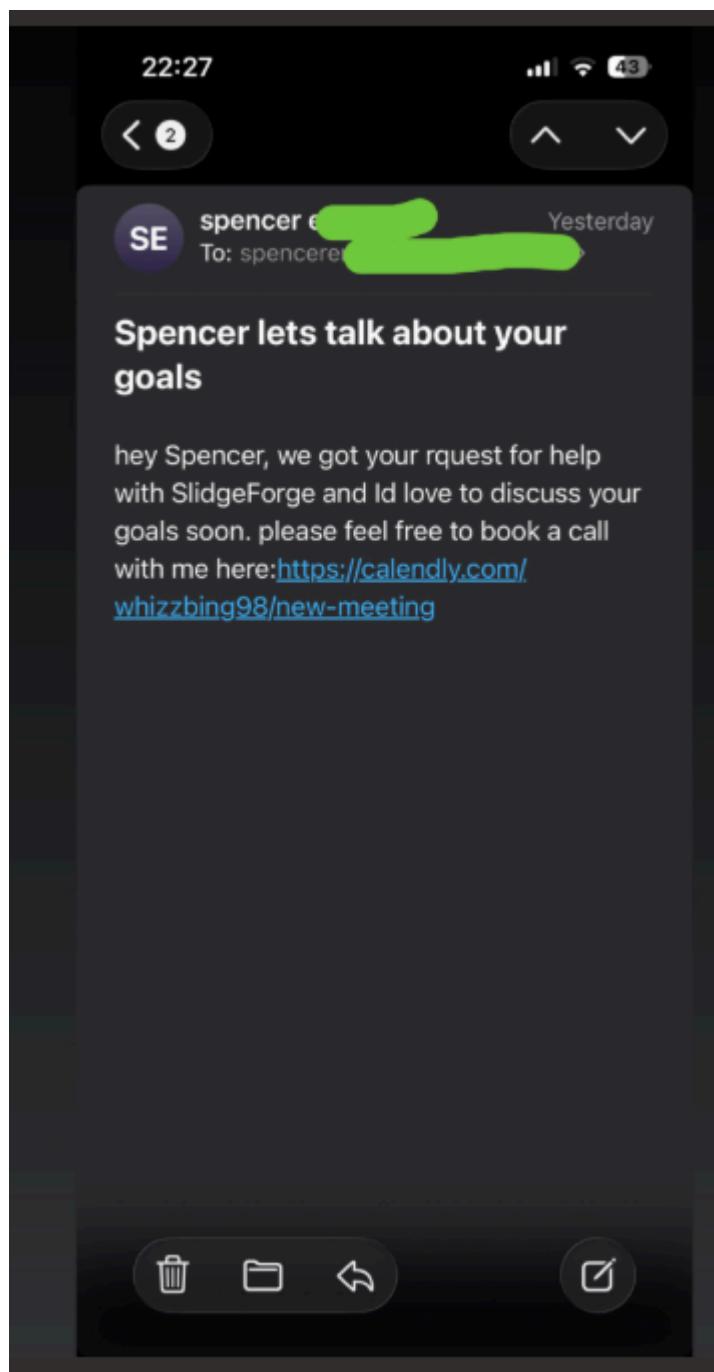
4. Action (Outreach): The system branches using a Router.

- **Gmail:** Sends a personalized email to the lead with a **Calendly link** to book a call immediately.

- **Slack:** Notifies the sales team of the new high-value prospect.

5. The Formatter (Text Passer): Before sending data to Slack, I implemented a **Text Passer** module using a **regular expression (Regex)**. This acts as a "smart highlighter" to strip away messy metadata and line breaks, ensuring the Slack notification is clean and professional.





Airtable

⋮ ⌂ ? ×

➤ Connection *



My Airtable Token or Key ...



Add

For more information on how to create a connection to Airtable,
see the [online Help](#).

➤ Base *

lead base



➤ Table *

⟳ Refresh

Lead contacts



➤ Record ID *

1. ID

Search

➤ Record

➤ first name



Advanced settings

Cancel

Save

➤ contacted on

now

🌐 Time zone: Europe/London

⌚ For more information about supported date formats, see
the [online Help](#).

➤ Call Summary

➤ Interested

Map

Yes No Empty

➤ Proposal Sent on

🌐 Time zone: Europe/London



Advanced settings

Cancel

Save

Text parser

⋮ ⌂ ? ×

> Pattern *

```
"value"\s*:\s*"([""]*)"
```

The search pattern is a regular expression. Output groups are defined based on the expression. For details see the [module documentation](#).

Named capture groups can be specified like `(?<name>.*)`

> Global match

Yes No

If checked, the module will find all matches rather than stopping after the first match. Each match will be outputted in a separate bundle.

> Case sensitive

Yes No

> Multiline

Yes No

If checked, beginning and end metacharacters (^ and \$) will match

Cancel

Save

Airtable

⋮ ⌂ ? ×

> Connection *



My Airtable Token or Key ...



Add

For more information on how to create a connection to Airtable,
see the [online Help](#).

> Base *

lead base



> Table *

Lead contacts



> Trigger configuration

> Trigger field *

created on



A [Created Time](#) or [Last Modified Time](#) field that will be used to sort records. If you do not have a [Created Time](#) or [Last Modified Time](#)



Advanced settings

Cancel

Save

Airtable

⋮ ⌂ ? ×

> Label field *

company name



A field that will be used as a label for a record

> Limit *

10

The maximum number of records to return.

> View



> Formula

(Qualification) = "Qualified"

An Airtable formula used to filter records. The formula will be evaluated for each record, and if the result is not 0, false, "", NaN, [], or #Error! the record will be included in the response. You can [find more information about the formula on Airtable's website](#).



Advanced settings

Cancel

Save

6. **Output:** The system updates the original Airtable record with a "Contacted On" timestamp, providing the team with a full audit trail of the automation.

Key Skills Demonstrated

- **AI Literacy:** Identifying how to use built in AI tools (Airtable AI) to replace manual decision making.

- **Data Formatting:** Using **Regex** and **Text Passers** to manage data inconsistencies between different platforms.
- **Workflow Logic:** Implementing **Routers** to handle multiple tasks (Email and Slack) simultaneously, avoiding "waterfall" failures.
- **Tool Integration:** Connecting various APIs (Tally, Airtable, Gmail, Slack) into a single, cohesive business system.

Analogy for Stakeholders: Think of this system as a digital gatekeeper. Tally is the front door, Airtable AI is the expert receptionist who checks the visitor's credentials, and the Text Passer is the editor who ensures the message delivered to the boss is perfectly polished and easy to read.