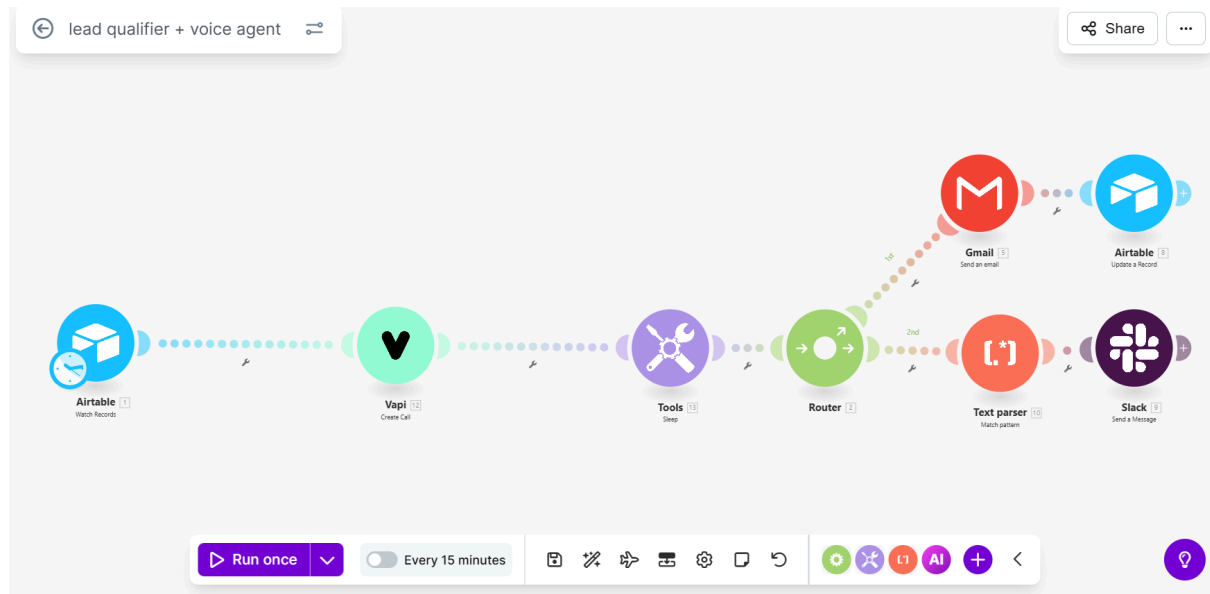


This project is an end to end AI automation that functions as a 24/7 "digital worker," designed to qualify inbound leads and initiate voice outreach without human intervention. By bridging the knowledge gap between manual sales tasks and AI efficiency, this system ensures that high-value prospects receive 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  $\geq$  £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

lead base

DataAutomationsInterfacesForms

Saving...Upgrade

Lead contacts

+ Add or import

Grid view

Hide fieldsFilterGroupSortColorShare

+ Create new...

Find a view

Grid view

	A first name	A company name	last name	phone number
4	micheal	networkingAuto	ceesay	+447416789159
5	blake	blakeEmpowerment	mathew	+447503056087
6	amara	cakesgalour	vanilla	+447654345678
7	mary	07416578234	shebolu	+447435324356
8	melanie	lushiousCakes	stewart	+447865432845
9	blake	BlakeIncorporated	josh	+447834521394
<input type="checkbox"/>	stephanie	StepInc	hubert	+447503061034
11	fimirmf	knmckmcr	voifvjro	+447503063456
12	malachi	fakecompany	bush	+447503061345
13	luke	slushcookies	bishop	+447503087654
14	craig	yjcorporate	thomas	+447503061345
		SweetTreats	cutler	+447503061011

✉ email	💰 budget	📄 notes	📅 created on
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<a href="mailto:jakecutlery@gmail.com">jakecutlery@gmail.com</a>	£25,000.00	hello, I want to improve my...	1/8/2026 5:20pr

📅 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 Stewert 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...	

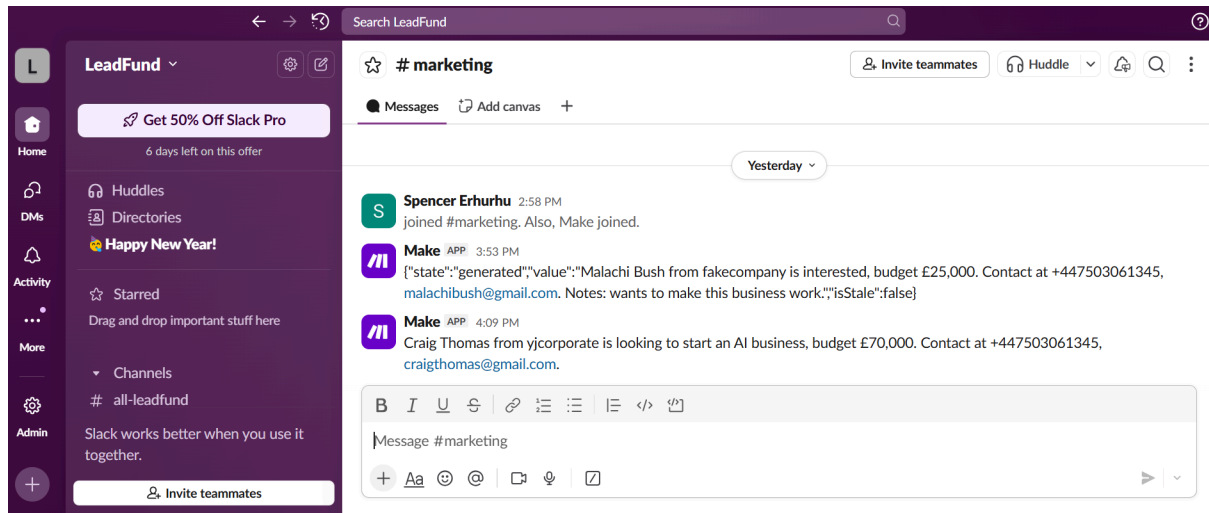
3. **The Filter:** A filter in Make.com ensures only records marked "Qualified" by the AI proceed to the outreach phase.

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.



22:27

43



2



SE

spencer e [redacted]

Yesterday


To: spencere [redacted]

## Spencer lets talk about your goals

hey Spencer, we got your request for help with SledgeForge and I'd love to discuss your goals soon. please feel free to book a call with me here: <https://calendly.com/whizzbing98/new-meeting>



> 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

> **contacted on**

🌐 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

## &gt; Connection \*

 My Airtable Token or Key ... ▼ Add

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

## &gt; Base \*

lead base ▼

## &gt; Table \*

Lead contacts ▼

## &gt; Trigger configuration

## &gt; 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** field in your schema, we will create one for you.

☐ Advanced settings

Cancel

Save

## &gt; Label field \*

company name



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

## &gt; Limit \*

10

The maximum number of records to return.

## &gt; View



## &gt; 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.