Agency Lead Qualification & Appointment Chatbot

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Project Overview

This is an advanced, fully no-code chatbot system built specifically for digital marketing agencies that manage 50+ clients simultaneously. The chatbot serves as an intelligent 24/7 lead capture and qualification engine across multiple client websites.

It seamlessly integrates website forms and live chat widgets with conversational flows that qualify leads in real-time, book or reschedule appointments directly into Go High Level calendars, apply dynamic custom tags for precise segmentation, and automatically trigger sophisticated GHL workflows such as internal notifications, task assignments, opportunity creation, pipeline progression, and personalized nurture sequences.

The entire solution is designed for extreme scalability — one centralized system powers dozens of agency clients while delivering personalized, context-aware conversations tailored to each client's services, locations, and business rules.

Primary Objectives Achieved
• Complete automation of initial lead handling and appointment setting
• Significant improvement in lead quality through multi-step qualification
• Elimination of manual data entry and follow-up delays
• Enhanced sales team efficiency through instant alerts and pre-segmented leads
• Seamless multi-client deployment without per-client custom coding

Key Features

Multi-Channel Lead Capture
• Triggers instantly from website contact forms, quote requests, or live chat widgets
• Supports both web-based chat and SMS-to-SMS conversations
• Maintains full conversation context across channels when possible

Intelligent Conditional Qualification
• Dynamic questioning based on industry-specific needs (service interest, property type, location, budget, timeline, urgency)
• Branching logic that adapts questions based on previous responses
• Natural, human-like conversation flow with context retention

Real-Time Appointment Management
• Full booking, rescheduling, and cancellation capabilities
• Checks calendar availability in real-time via Go High Level
• Offers alternative time slots when preferred times are unavailable

• Sends confirmations and updates automatically

Dynamic Contact Tagging & Segmentation
• Applies custom tags immediately based on qualification answers
• Examples: "High_Intent", "Ready_To_Book", "London_Lead", "Self_Funded", "External_Wall_Insulation", "Needs_Reschedule", "Budget_Over_5k"
• Enables precise lead routing and follow-up prioritization

Advanced GHL Automation Triggers
• Automatically enrolls contacts into specific workflows based on tags
• Creates opportunities and moves them through pipeline stages
• Assigns tasks to sales team members
• Sends internal Slack/email notifications for hot leads
• Initiates personalized SMS/email nurture sequences
• Updates custom fields with conversation summary

Multi-Client Scalability
• Single chatbot deployment serves unlimited agency clients
• Client-specific routing, branding, and qualification rules
• Centralized management with per-client performance tracking

Sample Conversation Flow

1. Lead submits contact form on client website (e.g., insulation company)
2. Closebot instantly sends outbound message: "Hi! Thanks for reaching out about home insulation. How can I help you today?"
3. Lead responds: "I want to book a free survey"
4. Chatbot qualifies:
   - Which service? (External wall, internal wall, loft)
   - Property type? (Detached, semi-detached, flat)
   - Location/postcode?
   - Self-funded or grant?
5. Checks calendar availability for preferred date/time
6. Books appointment in correct GHL calendar
7. Applies tags: "External_Wall_Insulation", "High_Intent", "Self_Funded"
8. Triggers GHL automations:
   - Creates opportunity in "Survey Booked" stage
   - Assigns task to surveyor
   - Sends internal notification to sales team
   - Enrolls in confirmation + reminder sequence
9. Sends confirmation to lead with appointment details

Tech Stack

• **Closebot** – Primary conversational platform for multi-channel chat flows and conditional logic
• **n8n** – Backend workflow automation for complex integrations, real-time API calls, tagging logic, and GHL workflow triggers
• **Go High Level** – Central **CRM** handling contacts, calendars, opportunities, pipelines, tags, tasks, and automated workflows
• **Twilio** (**integrated via GHL**) – **SMS delivery and confirmations**

Business Impact

• **Higher Quality Booked Appointments** – Only qualified, intent-matched leads reach the calendar
• **Precise Lead Segmentation** – Sales team receives pre-tagged, prioritized leads with full context
• **Dramatically Reduced Manual Work** – Eliminates data entry, appointment coordination, and initial follow-ups
• **Faster Sales Cycle** – Hot leads get immediate internal alerts and automated nurturing
• **Extreme Scalability** – Agencies can onboard new clients weekly without additional development
• **Improved Conversion Rates** – Better qualification + automated follow-up = higher show rates and close rates
• **Cost Efficiency** – One system replaces multiple tools and manual staff hours

This project demonstrates enterprise-level no-code architecture capable of replacing traditional custom development solutions while maintaining flexibility, speed of deployment, and ongoing maintainability.

Contact Information

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Thank you for reviewing this project.