

Lead Scoring & Notification Workflow – Submission by Banele Mlalazi

Introduction




This project demonstrates a complete lead scoring and follow-up automation system built using **n8n**. As part of the REMWaste technical challenge for the role of **n8n Expert**, I designed and implemented a workflow that simulates a real-world scenario where leads are captured, evaluated, stored, and followed up based on their potential value. The solution prioritises clarity, flexibility, and scalability, making it adaptable across industries. It also addresses practical limitations and proposes thoughtful improvements based on my experience during testing and debugging.

Workflow Overview

This n8n workflow automates the full lead capture and follow-up cycle:


- Captures leads from a simulated form
 - Scores them based on budget and interest level
 - Saves them to Airtable
 - Notifies via Slack if high priority
 - Sends a follow-up email and Google Calendar invite for hot leads
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Scoring Logic

Condition	Score
Budget \geq £5000 & Interest = "high"	 Hot
Budget \geq £3000 & Interest = "medium"	 Warm
Anything below	 Cold

This logic is handled in the custom JavaScript function inside the **Set Lead Score** node.

Slack Message Format

```
 New Hot Lead!  
Name: {{ $items('Set Lead Score')[0].json['full_name'] }}  
Email: {{ $items('Set Lead Score')[0].json['email'] }}  
Lead Score: {{ $items('Set Lead Score')[0].json['lead_score'] }}
```

Only leads scored as **Hot** will trigger this Slack alert.

Data Storage

All leads are stored in **Airtable** with the following fields:

- full_name
- email
- budget
- interest_level
- lead_score
- createTime

Calendar & Email Follow-Up

Google Calendar Invite:

- Automatically created for Hot leads
- Start time: `{{ $items("Code2")[0].json["now_plus_1_day"] }}`

Email Follow-Up:

- Sent 2 minutes after calendar event
- Friendly tone with agent-style language

Issues Faced

During development, multiple challenges arose:

- Nodes occasionally failed to connect properly or were not recognised by expressions
- Frequent trial and error was needed to adjust scripts and node references (especially with Slack and Google Calendar)
- Filter logic blocked downstream nodes until removed
- Some external integrations (e.g., CRM tools like Zoho) were blocked due to account type restrictions

These issues were overcome by simplifying the flow, removing the filter block that broke the chain, and refining the expression syntax (`$items()` standardised across nodes).

Limitations & Improvements

Area	Notes
Lead deduplication	Removed to fix filter conflict — can be restored with unique check
CRM integration	Agile and Zoho not viable for individual use (blocked at signup)

Area	Notes
Agent assignment	Slack messages are not agent-based (yet)



Future Recommendations

With more time, this system could be expanded by industry type:

Industry	Potential Additions
Real Estate	Property shortlisting, agent scheduling, and WhatsApp notifications
Education	Auto-enrolment forms, tutor booking, and grading status dashboards
Health & Wellness	Intake form scoring, appointment triage, and personalised emails
Freelance Services	Auto-contract generation, Stripe/PayPal integration, and feedback loops

Additionally:

- Integrate a real CRM like HubSpot (with OAuth support)
- Add a visual dashboard for lead stats
- Enable smart agent routing based on availability
- Sync with Google Sheets or Notion DB for extended analytics
- Add SMS or WhatsApp flows for follow-up automation



Hypothetical Business Case – "ZentraConsulting Ltd"

ZentraConsulting is a fictional consultancy agency specialising in small business advisory. Below is a mock visual analysis of how the n8n system could impact revenue:

Lead Conversion Funnel:

Stage	Conversion Rate	Leads/Month	Notes
Captured	-	300	From forms or ads
Qualified (Warm)	60%	180	Based on budget/interest
Hot Leads	30%	90	Auto-calendared + emailed
Converted	40%	36	Based on follow-up success







Revenue Projection (Monthly)

- Avg client spend = £1,200
- 36 conversions × £1,200 = £43,200/month potential

Profit/Loss Overview (Monthly)

Category	Amount
Revenue	£43,200
Operational Costs	£9,000
Tools & Platforms	£1,500
Profit	£32,700

Bonus Features Implemented

Feature	Status
Simulated lead trigger	
Slack alert	
Airtable storage	
Custom scoring logic	
Google Calendar invite	
Agent-style follow-up email	

Tools Used

Tool	Purpose
n8n	Workflow automation
Airtable	Lead database
Slack Webhook	Notifications
Google Calendar	Invite scheduling for hot leads

Conclusion

This submission reflects both the functionality and problem-solving approach expected from an **n8n Expert**. From node failures to CRM limitations, I encountered and overcame various real-world issues, documenting each step with precision. The resulting system showcases my ability to build structured, outcome-driven automations — while also identifying meaningful opportunities for further optimisation, personalisation, and revenue growth. With the right data and integration layers, this workflow could easily

scale across sectors from consulting to health, education, or retail — helping businesses streamline lead management and boost conversion efficiency.

Final Suggestions for Reviewers

- **Project Title:** N8N Workflow Build - Lead Scoring & Automation | Banele Mlalazi
 - **Sharing Method:** Ensure Notion access is set to “Anyone with the link can view”
 - **Export Options:** This document is ready to export as a PDF or be hosted on Notion
 - **Keywords Optimised For:** Automation, n8n, Slack, Google Calendar, Airtable, Workflow, Follow-Up, Lead Scoring, Expression Logic, API Integration
 - **Optional Enhancements:** Add audio/video walkthrough, link to GitHub export or embed for workflow traceability
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This document reflects a working n8n build for workflow automation and scoring logic. All company names and figures are fictional and created for demo purposes only.